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

Proceedings 2022 International Pre-Conference

October 10-11, 2022
Milwaukee, Wisconsin

American Association for Adult and Continuing Education
827 Powers Ferry Road, Building 14, Suite 100, Atlanta, GA 30339, US
Phone: (678) 271-4319, Fax: (678) 229-2777, E-mail: office@aaace.org

Commission for International Adult Education (CIAE) of the American Association for Adult and Continuing Education (AAACE) 71th 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 raise awareness of global issues in adult education from a transnational, multi-directional, multicultural, and indigenous perspectives.
- To be the international arm of the American Association of Adult and Continuing Education (AAACE).
- To promote global linkages or exchanges with adult education associations and individuals in other countries.
- To invite presentations, conference participation, leadership, and webinars by interested adult educators around the world at all career stages.
- To collaborate or cooperate on research or other projects of mutual interest related to lifelong learning and adult education across the globe.
- To recognize and award achievements in international adult education – individual or collaborative learning, projects, research, and collaborations.

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

Identifiers: ISBN 979-8-9852491-1-8 (digital online)

Wendy Griswold, Ph.D., Editor
Director, CIAE, AAACE, (2021-2023)
wgrswold@memphis.edu

Valeriana Colón, Ph.D., Technical Editor, colonv@vcu.edu

Lauren Boyd, Technical Editor,
lkboyd1@memphis.edu

Billie McNamara, Technical Editor,
bmcnamar@vols.utk.edu

Editor's Note

These *Proceedings* are from the Commission of International Adult Education's (CIAE) 2022 International Pre-Conference. This year's *Proceedings* contain 12 papers from 18 authors, representing CIAE's usual diversity of authors and topics.

Researcher and research sites include Canada, China, Ghana, Italy, Nigeria, and the United States. A major theme continuing from the 2021 conference is the impact of COVID-19 on learners in a variety of settings, including teacher training, adult basic education, and higher education. A second major theme concerns cross-cultural learning, including among migrants and in higher education. Some papers address adult learning experiences in myriad social contexts, such as learning for democracy, aging, military, and spiritual learning.

A special feature at this year's Pre-Conference is a focus on CONFINTEA VII and the Marrakech Framework for Action. A panel and discussion session on these important endeavors are part of the Pre-Conference Agenda. To support our learning and conversation, key documents are provided in the 2022 *Proceedings*.

I am immensely grateful all the individuals who contributed and were involved in preparing these *Proceedings*. Abstract reviewers included: Sara Bano, Valeriana Colón, Sabine Dantus, Michelle Glowacki-Dudka, Jean Kirshner, Hye-Su Kuk, Karen LaMarsh, Billie McNamara, Anita Samuel, Qi Sun, Fujuan Tan, Jane Teel, Nancy Truett, and Linda Tsevi. Paper reviewers included: Sara Bano, Marcie Boucouvalas, Valeriana Colón, Sabine Dantus, Jean Kirshner, Karen LaMarsh, Annalisa Raymer, Anita Samuel, Fujuan Tan, and Jane Teel.

A special thanks to Valeriana Colón, who has served as an editorial assistant for the *Proceedings* for several years. Without her consistent excellent support, producing a quality *Proceedings* would be immensely more difficult. Additional thanks to Lauren Boyd, who joined our editorial efforts this year and was instrumental to the *Proceedings* being produced in time for this year's conference. Deep appreciation to Billie McNamara whose editing post-conference raised the quality of our *Proceedings*.

Finally, I humbly and gratefully acknowledge the support of the immediate past directors of CIAE, Mejai Avoseh and Marcie Boucouvalas, for their continued mentorship and support. I would not have the honor of this task without their leadership and guiding lights.

Despite the fine contributions by the individuals above, I take total responsibility for any inadvertent errors in these Proceedings.

Wendy Griswold, Ph.D., Editor
Director, Commission for International Adult Education, AAACE
wgrswold@memphis.edu

Message from AAACE President

Welcome to the CIAE Pre-conference,

On behalf of the Board of Directors for the American Association for Adult and Continue Education, thank you for attending the 2022 AAACE, Commission of International Adult Education Pre-conference in the beautiful city of Milwaukee, WI. We are so pleased to have you join us in what Adrian Mak (2020) described as one of the most ethnically and culturally diverse cities in the United States.

The Commission for International Adult Education is crucial in helping AAACE draw closer to its vision of "a more humane world made possible by the diverse practice of our members in helping adults acquire the knowledge, skills and values needed to lead productive and satisfying lives." Through the efforts of Dr. Griswold, chair of the Commission of International Adult Education (CIAE), and all of you, we are so pleased that you are coming together once again to give voice to the global and international concerns which effect all of us. By coming together in times like the ones we have been experiencing over the past few years, it is important for us to share and exchange scholarship and practices that have been used to make space and give voice to what we can do as adult educators to make a difference in the world. Through CIAE we believe you have an opportunity to challenge and create possibilities that will help us move even closer to the values we seek within the field of adult education and through this association. Your presence here is further evidence of your commitment to creating a space and place for all voices to be heard and included in the discourse within the field of adult education.

We are very excited that you have chosen to represent your various countries and share your research, perspectives, and insights about what is happening within the field of adult education across the globe. This year we have members representing, Canada, Ghana, Nigeria, China Italy, and the United States in attendance. Thank you for attending this year's conference and helping us shape the future direction of the adult education field and practices. What better place for us to be, than in a city that represents the cultural and ethnic diversity within CIAE and AAACE.

Thank you for your service, commitment, and contributions to the field of adult education, and we look forward to having you join us at the 2022 AAACE Annual conference in Milwaukee. We hope you enjoy your time together as well as throughout the AAACE conference. Your voice and presence are needed as we continue to press forward to shape our future across the globe together.

Best,

Vanessa Sheared

Vanessa Sheared, EdD
Board President, 2021-2022, AAACE

Commission for International Adult Education (CIAE) of the AAACE International Pre-Conference 2022

Table of Contents

ADAPTING TRANSFORMATIVE LEARNING-DELIVERY APPROACH TO SUSTAINABLE ADULT BASIC EDUCATION IN NIGERIA WITHIN THE NEW AGE

Elizabeth Aanuoluwapo Ajayi[1]
'Labayo Kolawole Kazeem[2]

ABSTRACT: In practice, adult basic education activities are educational activities that adults engage in systematically so they can gain new forms of knowledge, skills, attitudes, or values for self-sustenance to ensure self-improvement and national development. Achieving these requires an appropriate approach which is vital for the participation of learners to ensure transformational results. However, the plague of COVID-19 created a disorientating dilemma for facilitators around the world, especially in developing countries like Nigeria, with little or no alternatives to regular physical contact learning-delivery systems using digital learning approaches. This imposed paradigm shift has created the need for flexible, adaptable, and sustainable delivery of adult basic education in Nigeria, while we await full utilization of digital learning. An adaptable Transformative learning delivery model which uses a blend of both transformative learning and each-one-teach-one approaches is proposed to achieve the dual-aim of adult basic education. The proposed learning-delivery model to be implemented by adult educators in Nigeria as well as other developing countries will assist learners to become active citizens for self-improvement and national development. This model suggests that facilitators will utilize the full participation of learners through their conscious and concerted efforts towards learning. In addition, facilitating learning with this model will show continual effort to attain sustainability of adult basic education, even in the advent of national or global uncertainties like COVID-19.

Keywords: transformative learning, adult basic education, Nigeria

Adult learning and education (ALE) is a core component of lifelong learning which has always been at the forefront for the betterment of life for adult citizens. By definition, UNESCO (2015) stated ALE includes all forms of learning by adults to enrich their personal development and capacities for their self-interest as well as that of their communities, organizations, and societies. From this definition, it can be seen that all forms of ALE have dual aims that are woven around the ability of adult learners engaged in ALE to seek self-improvement for their nation's development. Ensuring this means education for adults must occur at the basic, intermediate, and advanced level. For the basic level where it is compared to the formal system of education, it can be identified as Adult Basic Education (ABE). Therefore, in the context of this study, ABE is the equivalent of Universal Basic Education in Nigeria that is basic and post literacy education.

ABE in Nigeria emphasizes functional literacy in line with the dual aim of self-improvement and national development. These types of ALE, as well as other types in developing countries like Nigeria, are often delivered at learning centers depicting the physical presence of learners, facilitator(s), and learning content. Nigeria's education

[1] Department of Adult Education, Adekunle Ajasin University, Akungba-Akoko, Ondo State, Nigeria. lizabeth.ajayi@gmail.com/elizabeth.ajayi@aaua.edu.ng
[2] 'Labayo Kolawole Kazeem: Department of Adult Education, University of Ibadan, Ibadan, Oyo State, Nigeria. kolakazeem@gmail.com

policy states that the objective of adult education is to provide functional literacy and education for youth and adults who never went to school or prematurely dropped out of school (NMEC, 2017). This means literacy helps beneficiaries to perform roles in the society effectively as a sure way of empowerment. However, sustaining the activities involved in ABE is the main crux in the plans for the actualization of sustainable development goal 4 (SDG 4) target 6 which is "by 2030, ensure that all youth and a substantial portion of adults, both men and women, achieve literacy and numeracy" (UN, 2018, p. 28).

So far, collective efforts are being made by the government to address the sustainability of ABE for SDG 4, fighting emerging challenges of illiteracy and establishing a culture of lifelong learning. Efforts are in place such as funding of adult basic education, development of literacy campaigns, and implementation of policy guidelines, among others. Unfortunately, these efforts were hampered in early 2020 by the rage of the coronavirus (COVID-19), which started as a mysterious case of pneumonia in Wuhan, China, in December 2019 (Ebohon et al., 2021). The coronavirus gradually transformed into a respiratory global contagious pandemic, spreading throughout the world. This spread disrupted all aspects of life socially and economically. The sting of the pandemic was obvious in the educational sector as there was no treatment option for the virus. Therefore, the World Health Organization (WHO) recommended simple personal hygiene practices such as frequent washing of the hands, use of alcohol-based sanitizers, covering of the mouth while sneezing and or coughing, disinfecting surfaces as well as keeping social distance as sufficient prevention to hinder the spread of the contagious virus (Guner et al., 2020). The WHO recommendations to stop the spread of the virus made it compulsory for all gatherings to be suspended including physical educational activities (Ebohon, et al., 2021).

According to Adelakun (2021), the effect of the closure of schools and other educational facilities was deeply felt with static educational activities from March to September 2020. Apena (2021) also stated that the sustainability of adult literacy programmes was hampered by the lack of physical classes and social distancing. The Executive Secretary of the National Commission for Mass Literacy, Adult and Non-Formal Education (NMEC), Prof. Akpama Simon Ibor noted that the advent of COVID-19 had frightened and embarrassed Nigeria by the compounding and multiplying the problems of adult and non-formal education in an unprecedented way (Erunke, 2021b). This effect was obvious since there was lack of our norms of physical contact at learning centers. These made facilitators begin questioning previously held assumptions about learning-delivery in ABE, as well as seek adequate delivery responses to meet learning needs.

ABE in Nigeria Pre COVID-19

From time immemorial, ABE has been the basis for ALE in Nigeria and that aided the conceptualization and early professionalization of adult education. Ajayi (2019) explained that the idea of ABE in Nigeria was a response to the pool of adult non-literates in the 11th century. It can be said that both Islam and Christianity successively started literacy for adults, primarily for them to be able to read, write and compute figures for the

sake of the scriptures. This made literacy a vehicle for involvement in social, cultural, political, and economic activities throughout one's lifetime (Kazeem, 1998). There had been constant efforts by government since colonial rule. Njoku (2010) noted that as a British West African territory, Nigeria's entire literacy campaigns were funded by the government. Since independence, there have been historic landmarks such as the establishment of the Nigerian National Council for Adult Education (NNCAE) in 1971; adult education units in ministries of Education since 1975; a chapter for adult education in the policy of education in 1977 (revised/reprinted in 1981, 1998, 2004, 2007, 2013, and 2014); a 10-year mass literacy campaign begun in 1982; establishment of NMEC in 1991; establishment of agencies of adult and non-formal education; establishment of the national center for adult education in Kano in 1991; publishing the policy guidelines for mass literacy, adult and non-formal education in 2017; and establishment of literacy by radio, among others (Chieke et al., 2017; NMEC, 2017).

The responsibility of running ABE (funding, curriculum content, duration and location) is distributed through three tiers of government (Federal, State, and Local) through the Federal Ministry of Education, NMEC, state agencies for mass education, and adult education departments at local government councils. Funding is primarily the task of the government with support from philanthropists and international development partners. The curriculum covers basic literacy, which includes 1) symbols in the language of the immediate environment to possess the ability to read, write and perform numeracy for daily activities and 2) post-literacy covering English, mathematics, social studies, tourism, health education and hygiene, life skills, citizenship education, computer education, home management, religious, moral and civic studies, basic science, and agriculture. The policy guidelines state that in actualizing this curriculum content, there is a requirement for a physical learning space with proximity to potential learners managed by qualified facilitators with at least 78 contact hours in 9-12 months and 18 months for basic and post-literacy respectively (NMEC, 2017).

In practice, most learning centers in Nigeria usually have at least one hour of contact per day, three days a week. The learning-delivery approaches often used include a synthetic approach involving identification of alphabets as the first step to basic literacy; an analytic approach involving starting literacy with reading of meaningful sentences; Each-One-Teach-One (EOTO) approach involving a literate person adopting or funding the literacy of another non-literate; group discussions involving learners being in groups each with a leader, discussing certain issues; demonstration involving teaching specific skills by presenting how something is being done; seminar presentations, wherein a resource person who is an expert or specialist in a field gives learners professional guidance and lessons. Aside from the fact that this requires maximum presence in a physical learning environment, these approaches have been faulted as pedagogical and less transformational for adult learners (Ajayi, 2019; Ajayi & Kazeem, 2020; Simeon-Fayomi et al., 2017). These approaches were difficult to maintain during the COVID-19 lockdown, hence the move to digital learning world-wide.

ABE During the COVID-19 Era

All around the world, to bridge the gap in learning during the COVID-19 lockdown, nations were forced to rethink the educational opportunities ABE offers and especially the mode of delivery. UNESCO (2020) noted that as a measure to curb the effect of COVID-19, Information and Communication Technology (ICT) has been used more than before to keep abreast of health information, stay in touch with families and relatives, as well as enhance home schooling. COVID-19 brought into the limelight and reinforced the benefit of digital literacy and exposed some countries' inadequacies for such learning. Most developed countries had a smoother learning transition to digital, while some developing countries had a slow movement or were static. Lotas (2021) noted that adult learning at some centers in the United States of America abruptly shifted from in-class teaching augmented by digital learning tools to a totally remote learning environment reliant on digital learning. In the United Kingdom, social media (Facebook and Twitter) were the initial digital means used by organized community workers and volunteers to assist those facing health, education, and economic challenges (Campbell, 2020). Blundell et al. (2020) also noted that in the UK, facilitators provided support through imaginative online teaching resources as well as one-on-one. In Canada, literacy lessons were provided through press conferences, online conferences, individualized phone calls, and even physical mail for adults who were not comfortable with new technologies (Brossard, 2020). Dang et al. (2021) explained that there was a low number of contact with teachers during the pandemic lockdown in sub-Saharan Africa, although there were avenues for contact through SMS, online applications, email, mail, telephone, WhatsApp, Facebook, and others.

Specifically, in Nigeria, remote learning and the use of ICT to keep ABE learners active in learning was the radio literacy programme. Erunke (2021a) explained that “Literacy by Radio” was resuscitated in seven states with support from NMEC by providing primers, facilitation guides, payment of airtime, facilitators’ stipends for three months, and memory cards for storing recorded lessons. Although this was a good pursuit, sustainability was not assured. Achieving the expected result can be said to be minimal in view of epileptic electricity supply to listen to the broadcast especially in rural environments. A better achievement might have been attained like other developed countries if the country had high levels of digital skills. NMEC’s executive secretary noted that even though we live in a global digital society, digital illiteracy has been preventing Nigerians from availing themselves mass digital information (Erunke, 2021b). Meanwhile, if facilitators were equipped with requisite knowledge and skills on how to maximally utilize digital learning tools and adults could actually learn to read and write by using digital tools, then the ABE process would be more flexible, efficient, and adequate. Erunke (2021b) noted that deploying digital tools for ABE is challenging in Nigeria.

The impact of this laxity was obvious in the participation and achievements of ABE during this new era compared to the preceding years. For instance, in Ondo State, there were 4,200 and 4,731 adult learners registered in 2018 and 2019, with 3,975 and 4,513 graduating in those years. In 2020 and 2021, 2,138 and 2,118 registered, with 1,678 and

1,631 graduated respectively (Ondo State Board for Adult, Vocational and Technical Education, 2021). This shows that the sustainability of ABE is shaking if the learning-delivery approaches are still largely dependent on three times a week contact without adequate digital skills, facilities, and tools to support and reduce physical contact. Although digital literacy for ABE can and must be attained, the transition to digital learning delivery might not be as fast as expected due to some factors such as political will, epileptic power supply, provision of disseminating tools, and erratic telecommunication networks, among others. Meanwhile, what alternative approach to teaching can minimize physical contact? If perhaps there is another outbreak to breach the flow of contact in this new age, what delivery approach can we use as a developing country to ensure the adult non-literates are not exempted from the learning process? What approach can be used to ensure that the disturbance of the new norm serves as a motivation and basis for learning?

Integrated Transformative Learning-Delivery Approach to the Rescue

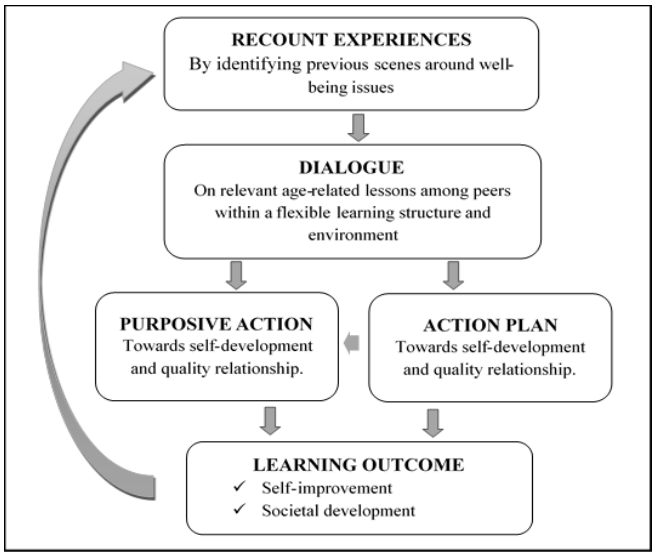
Transformative learning (TL) is key in the sustainability of ABE because of its potential to break away from residual habits and help open up new possibilities and ways of engaging. Learning in this context is self-actualization since learners come to the learning environment with prior knowledge that affects their present and future learning. Moran and Moloney (2022) commented that good facilitators recognize that learners come to the learning environment with prior knowledge and learning past, which may form a loophole to be filled by their present and future learning. That means transformative learning is an endlessly positive experience in the context of self-actualization. It is an approach to teaching and learning based on promoting change, with educators challenging learners to critically question and assess the reality of their deeply held assumptions about how they relate to the world and situations around them (Meyer, 2009). TL as an approach for teaching-learning, is a method that ensures lifelong learning, active and experiential learning, problem-based learning, collaborative and social learning, and empowerment and dialogue education. It is an articulation of the past, enhancing the present knowledge, skills, and abilities (Ajayi & Olatumile, 2018). The approach reflects how meaning is made, experiences are interpreted, with adults questioning, reflecting on, and conversing about these experiences in order to develop and grow.

Ajayi and Kazeem (2020) established a Transformative Learning Approach (TLA) model, which depicts a cyclic model for learning depicted in Figure 1.

Adapting this model for ABE in the new age means learners come to the learning environment to recount both their pleasant and unpleasant experiences emanating from the disorienting dilemma of both low literacy levels and challenges of COVID-19, which new knowledge may help rectify. Then dialogue and discussions with others experiencing or having experienced similar disorienting dilemmas based on relevant content will exist among learners with support from the facilitator. This means new knowledge will be developed, and learners may convert it to immediate implemented action for change, or they may engage in plans towards future actions. Then learners are expected to

continuously check and improve themselves and society through learning, unlearning, and re-learning based on the new knowledge that evolves in each learning section.

Figure 1. *New Paradigm of Transformative Learning Approach (Ajayi & Kazeem, 2020)*

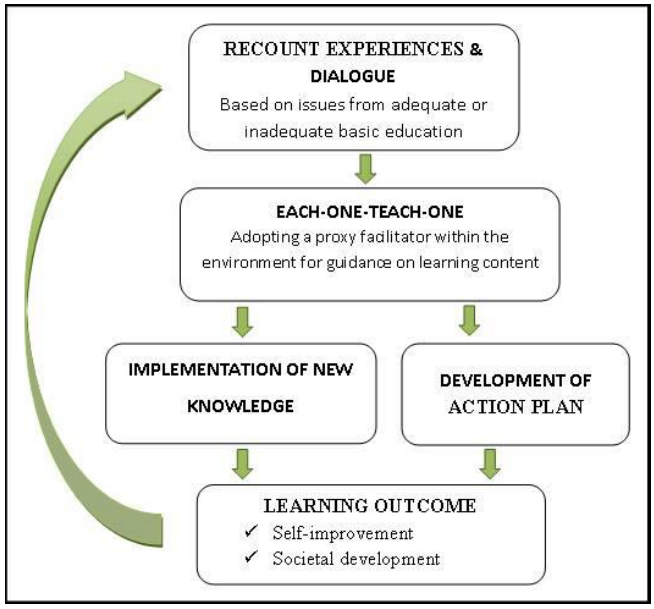


However, considering the fact that in the new age, we are trying to reduce the need for constant physical gathering in the absence of full digital literacy, this paradigm should be adapted to integrate the EOTO approach as a replacement for physical dialogue. Each–one-teach-one is an approach to literacy developed by Laubach in 1935. It is an approach wherein a literate person is meant to adopt and teach a non-literate person so they can also learn. According to Bello (2020), each-one-teach-one is a good and cost-effective learning delivery approach in adult education. This approach was pronounced for literacy campaigns in Nigeria with the intention of each literate adult funding the literacy or personally offering to teach a non-literate person. The concentration was on funding the literacy of non-literates. When economic crises happened in the country, the programme became moribund (Bello, 2020). However, this approach should be more of the literates becoming proxy facilitators for the non-literates.

Therefore, it is envisioned that if the approach is used as an integral part of another approach and not a standalone approach as seen in Figure 2, then better results might be achieved.

From Figure 2, it is assumed that the learning process for ABE will involve minimal contact, especially at the start of learning activity. It shows that there will be a recount of experiences and dialogue based on issues from inadequate basic education. For instance, the inability to read information appropriately on billboards might have hindered access to certain health information or the inability to continue learning during the lockdown period due to a lack of digital literacy. Learners with similar disorientating dilemmas may be grouped for discussion within the class during contact and related lessons identified based on the curriculum of the adult basic education. These identified lessons will be the ones implemented at the next stage.

Figure 2. *Adaptive Transformative Learning-Delivery Approach for Adult Basic Education*



The next stage is for learners to identify their literate child or neighbor, or family member who is literate and who stays around or with them. This identified person will serve as a proxy facilitator to guide them through the lessons at home. Since the learner is to identify the person, the proxy facilitator may be more than one person based on the perceived interest or expertise. The proxy facilitator will enhance learning based on the identified lessons from the previous stage of the dialogue needed. This proxy facilitator, alongside the learner, will be in contact with the facilitator when issues arise from the lesson content. From the lessons learnt with the support of the proxy facilitator, learners either start to implement new lessons or plan toward implementation.

The next stage is for learners to develop new actions from the lessons or plan for the actions, and the implementation of the action will then lead to the dual aims of adult basic education, which are personal improvement and societal development. However, this is expected to lead to another dialogue and recount of experiences when the learners meet again with other learners and the main facilitator in the physical learning center. This cycle continues until the curriculum content is achieved within the space of a year as stipulated by NMEC National policy guideline.

SWOT Analysis of Adapted Transformative Learning-Delivery Approach Model

Denampo (2005) expressed that creatively facilitating for adults is an important strand of learning. As such, facilitating the integrated creative techniques of TLA and EOTO is a welcome development. However, realizing that there might not be a perfect model without setbacks, analyzing the Strength, Weakness, Opportunities, and Threats (SWOT) of this new model is important.

Strengths

Ajayi and Kazeem (2020) noted that to increase national development in Nigeria, the use of TLA is important for adults in order to ensure full participation in the experience, with an ultimate decision of improvement through personal plans. While Bello (2020) expressed that regardless of geographical factors, EOTO is an appropriate learning-delivery technique. Therefore, the main strength of this new model for a developing country without adequate facilities and strength for ICT blended learning is that it erodes the impediments of stagnant personal learning in situations of inability to go to physical learning centers. Hence, there is no need to go to physical learning centers more than once a week or once in a fortnight. Also, it is a known fact that African culture appreciates providing support for each other; therefore, the idea of being a proxy facilitator helping a family member or neighbor to gain literacy skills is like a rescue mission, which is a strength for this model. One of the perceived flaws of the EOTO may be a social disparity between learners and facilitators. The learners may have a sense of inferiority complex with high-status caliber of facilitators that may be assigned to them by literacy organizations. However, in this model, it is the learners that are the ones to decide who they think can work with effectively to achieve maximum learning. This has the tendency to eliminate or minimize inferiority complex or social disparity.

Weaknesses

To enhance facilitating, the proxy facilitators and learners may have to be in contact through a mobile phone with the main facilitator. This might be a weakness because the facilities to enhance such contact (phones, electricity to charge, erratic network, and even airtime) might impede reaching out when needed.

Opportunities

The resources needed for each stage of the model are readily available, that is, the physical space (already existing learning centers) for the initial contact to deliberate with other learners. The proxy facilitator is also readily available within reach of learners (neighbours or family members). The cost for implementation is relatively low when compared to moving to learning centers daily three times a week. It's also cost-effective since the proxy facilitator can be paid by the learners in cash.

Threats

The major threat may be a lack of commitment by the proxy facilitator, if expectations from the learners are not met. Also, the timing of the teaching-leaning at the second stage might not always be favourable for both or any of the proxy facilitators and learners.

Conclusion

With the new age of reduced physical contact and the new entrance of the Marburg virus in Ghana, which may become widespread like COVID-19, another lockdown may be

imminent. This means facilitating and sustaining ABE may be a challenge if our current physical contact approach for learning delivery is all we have in place. However, although it is acknowledged that digital learning may offer a better solution, as a developing country, Nigeria is not yet ready with all facilities in place to meet the task for digital learning. As such, a novel learning-delivery model, which is not dependent heavily on digital facilities, is needed. Though the TLA and EOTO integrated model is novel to Literacy programmes in Nigeria, it may have some challenges in its use. However, the merit of its use is more than the demerits, and it can ultimately enhance the mode of delivery of ABE in Nigeria.

References

Adelakun, A. (2021). Corona virus (COVID-19) and Nigerian education system: Impacts, management, responses, and way forward. *Education Journal 3*(4), 88–102.

Ajayi, E. A. (2019). The role of traditional folklores in facilitating adult learning in Nigeria. *International Review on Education 65*, 859–877.

Ajayi, E. A., & Kazeem, L.K. (2020). Transformative learning approach and transformational learning of older women in Nigeria. *Proceedings of Adult Education in Global Times: An International Research Conference*, 11–19.

Ajayi, E.A., & Olatumile, A. (2018). Indigenous folklores as a tool of transformative learning for environmental sustainability in Nigeria. *Andragogical Studies II*, 29–44.

Apena, T. T. (2021). Sustainability of adult education programmes in Nigeria: A post pandemic threat to national development. *KIU Journal of Education, 16*(1), 133–142.

Bello, B. F. (2020). Each one teach one as a strategy for promoting literacy in Nigeria. *Capital Journal of Educational Studies, 6*(2), 56–65.

Blundell, R., Dias, M., Joyce, R., & Xu, X. (2020). COVID-19 and inequalities. *Fiscal Studies*, *41*(2), 291–319.

Brossard, L. (2020). Les populations en situation de précarité au temps de la COVID. *Institut de coopération pour l'éducation des adultes*. Retrieved May 22, 2022, from https://icea.qc.ca/fr/actualites/les-populations-en-situation-de-pr%C3%A9carit%C3%A9-au-temps-de-la-covid

Campbell, L. (2020). A call for solidarity: Community support for the Tollcross Community Action Network amidst the Covid-19 Outbreak. *Concept Journal*, *11*(supplement), 1–8.

Chieke, J. C., Madu, C. O., & Ewelum J. (2017). Adult Literacy: The Nigerian perspective. *Asian Journal of Educational Research 2*(2), 72–78.

Dang, H., Oseni, G., Zezza, A., & Abanokova, K. (2021). *Impact of COVID-19 on learning: Evidence from six Sub-Saharan Africa*. http://www.worldbank.org/lsms.

Denampo, G. (2005). *Each one teach one in education*. https://www.philstar.com.ed.amproject.org

Ebohon, O., Obiennu, A., Irabor, F., Amadin, F., & Omoreigie, E. (2021). Evaluating the impact of COVID-19 pandemic lockdown on education in Nigeria: Insights from teachers and students on virtual/online learning. *Bulletin of the National Research Center, 45*(76). https://doi.org/10.1186/s42269-021-00538-6

Erunke, J. (2021a). How COVID-19 widens barriers to quality adult, non-formal education in Nigeria. Retrieved February 22, 2022, from https://www.vanguardngr.com/2021/08/how-covid-19-widens-barriers-to-quality-adult-non-formal-education-in-nigeria-commission/

Erunke, J. (2021b). Nigeria has 38% non-literate adult population. Retrieved February 22, 2022, from https://www.vanguardngr.com/2021/10/nigeria-has-38-non-literate-adult-population-commission/

Guner, R., Hasanoghu, I., & Aktas, F. (2020). COVID-19: Prevention and control measures in community. *Turkish Journal of Medical Sciences 50,* 571–577.

Kazeem, K. (1998). Taking literacy education to the unserved in Nigeria: The potentials of religious institution. *Benin Journal of Educational Studies 11*(1&2), 71–77.

Lotas, S. V. (2021). The COVID-19 Pandemic from an adult literacy practitioner-scholar perspective: "Where we were", "where we are", and “where we should be going." Forum: COVID-19 and the Future of Adult Education. *Adult Literacy Education*, *3*(2), 50–54.

Meyer, S. (2009). Promoting personal empowerment with women in East Harlem through journaling and coaching. In Mezirow, J., Taylor, E. W. & Associates (Eds.), *Transformative learning in practice: Insights from community, workplace, and higher education* (pp. 216–226). Jossey-Bass.

Moran, C., & Moloney, A. (2022). Transformative learning in a transformed learning environment. *Journal of Transformative Learning*, *9*(1), 80–96.

Njoku, C. (2010). *Adult education in Nigeria*. http://caponic.blogspot.com/2010/08/adult-education-in-nigeria.html

National Commission for Mass Literacy, Adult and Non-Formal Education (NMEC). (2017). *Policy guideline for mass literacy, adult and non-formal education in Nigeria*. Yaliama Press Ltd.

Ondo State Board of Adult, Vocational and Technical Education. (2021). *Nos of learners enrolled and graduated.*

Simeon-Fayomi, B., Ajayi, E. A., Koruga, N., & Baswani, G. (2017). Enhancing employability through innovative teaching methods in Adult Learning and Education: A comparative study of Nigeria and India. In R. Egetenmeyer and M. Fedeli (Eds.), *Adult Education and Work Contexts: International Perspectives and Challenges* (pp. 201–216). Peter Lang.

UNESCO. (2015). *Recommendation on Adult Learning and Education*. https://unesdoc.unesco.org/ark:/48223/pf0000245179

_____. (2020). *UNESCO COVID-19 education response: Adult learning and education and COVID-19* [Education Sector Issue Notes 2.6]. https://unesdoc.unesco.org/ark:/48223/pf0000374636/PDF/374636eng.pdf.multi

United Nations. (2018). *The 2030 Agenda and the sustainable development goals: An opportunity for Latin America and the Caribbean* [LC/G.2681-P/Rev3].

PARTNERSHIP FOR DIGITIZING TEACHING IN POST-COVID NIGERIA: TRCN MASTER TRAINERS' DIGITAL LITERACY FOR TEACHERS AND SCHOOL ADMINISTRATORS

Frances A. Alimigbe, PhD[1]
Mejai B.M. Avoseh, PhD[2]

ABSTRACT: Aberration in teaching and learning caused by the Coronavirus (COVID-19) pandemic is still a stark reality. Efforts at ameliorating havoc in Nigeria necessitated the Global Partnership for Education (GPE) Accelerated Fund to support state-driven interventions to address gaps in delivering Education in Emergencies (EiE) and inequalities existing within the education sector. GPE is supported Nigeria with a COVID-19 response programme entitled 'Continuing learning through alternate home-based platforms' in 16 states across Nigeria to develop capacities of teachers and school leaders on effective use and application of technology in teaching and learning. The programme included a teacher capacity development component to enable teachers to utilize flexible digital and remote/home-based learning resources. The programme hopes to enhance teachers' and school leaders' capacity to deploy technology in classrooms and improve online and offline distance learning methods. Training needs assessment was conducted to ensure digital training was designed to fit the identified digital skills gap of teachers in Nigeria. This paper scrutinized secondary data to discuss various processes of the intervention. It further discussed outcomes of the programme on teachers who were target beneficiaries of the program and education in Nigeria. It then concluded with a focus on benefits of partnerships between donor agencies and Teachers Registration Council of Nigeria (TRCN), the training goal, desired outcomes, methodology, challenges, the way forward, and implications for school administrators on teaching and learning in Nigeria.

Keywords: digitizing, Master Trainers, teachers, school administrators, Nigeria

Background

Nigeria is the most populous country in Africa, and, as of 2020, Nigeria's population was estimated at 206,139,589 million people (Worldometer, 2022). Nigeria is a clear example of multi-ethnic diversity. The country has 36 autonomous states, the Federal Capital Territory, and 774 Local Government Areas . The country is bordered to the North by the Niger Republic, to the East by Chad and Cameroon, to the South by the Gulf of Guinea of the Atlantic Ocean, and to the West by the Benin Republic (Ajayi et al., 2022). The education system in Nigeria operates in three different phases: Basic Education (nine years), Post-Basic/Senior Secondary Education (three years), and Tertiary Education (four to six years, depending on the course of study) (National Policy on Education Federal Republic of Nigeria, 2004). Education is on the Concurrent list, meaning Nigeria's federal, states, and local governments administer education. Administration and control of education by law are vested in federal and state governments. The Federal Ministry of Education (FME) is responsible for overall policy formation, and it ensures quality control through its numerous relevant agencies. The Teachers Registration Council of Nigeria (TRCN) is a leading FME quality assurance agency.

TRCN is empowered by the federal government of Nigeria CAP T3 to control and regulate all aspects and ramifications of the teaching profession, including public and private institutions (Federal Republic of Nigeria, 2004). TRCN's mandate includes determining who teachers are and ensuring quality assurance in the teaching profession. TRCN has mapped out several strategies for the achievement of its mandates.

Registration and licensing of teachers are means TRCN uses to ensure quality, meet international best practices, and achieve professionalization of practitioners. To qualify for registration and licensing, education graduates must pass Professional Qualifying Examinations.

COVID-19 wreaked monumental damage on education globally, but with more devastating consequences in Africa due to a serious dearth of digital infrastructural and poor technical expertise of teachers. Moreover, Olanrewaju et al. (2021) claimed COVID-19 exposed a digital infrastructural gap between countries and communities, thus emphasizing the significance of digital infrastructure. The global reality is this: information and communication technology (ICT) is paramount for viable education. However, Ifijeh et al. (2016, as cited in Olanrewaju et al., 2021), posited "access to information and communication technologies and digital literacy, which is vital to knowledge empowerment, information generation, and utilization, is unequally distributed both in terms of access to digital tools and infrastructure" (para. 1). This statement reflects the reality in most remote and rural areas in Nigeria. Similarly, speakers at the 74th session of the United Nations General Assembly in 2019 noted, "Despite global progress in expanding use of the Internet and information communications technology , the digital divide between developed and developing countries remains wide" (United Nations, 2019, p. 1). Ferri et al. (2020) ascribed such issues as poor internet connectivity, poor infrastructural facilities, lack of operational capabilities and low teacher quality as some barriers to operationalization of ICT in teaching and learning. This is consistent with Buabeng-Andoh's (2012) finding the lack of sustainable investments in ICT infrastructure perpetuates digital exclusion despite technological advancements.

Teachers are supposed to be on the frontlines of national response to ensure continuity of learning outside the classroom; however, their inability to respond calls for urgent capacity-building in distance learning modes and resilient education systems. Addressing the issue of technical support for teachers in Nigeria, Tella et al. (2007) noted "Technical support [is] lacking in schools and teachers' lack expertise in using ICT" both hinder "teachers' readiness and confidence of using ICTs during lessons" (p. 5). Similarly, Global Business Coalition for Education (2017) found "a significant number of schoolchildren and teachers who lack access to digital technologies" as well as "the competence" to use them (par. 2). Kumari and D'Souza (2016) adjudged the "[d]igital literacy level of Secondary School teachers" and "the extent to which ICT is used ... is average" (p. 141). These shortfalls in teachers' digital knowledge raise serious concerns because teachers are supposed to be vanguards and sources of useable knowledge for learners, especially in times of pandemics and other disasters when online virtual education becomes the most viable option.

The Global Partnership for Education (GPE) initiated an intervention in 16 Nigerian states to ensure teachers are equipped with technology-supported solutions to aid teaching and learning. GPE is a multi-stakeholder partnership and funding platform focused on strengthening and transforming education systems in low-income countries. GPE seeks to give opportunities to the most vulnerable children, improve teaching and learning, and build resilient education systems to withstand challenges of the 21st century.

GPE's intervention in Nigeria was a way of responding to challenges of COVID-19. The goals were repositioning the future of teaching and learning in Nigeria and ensuring more schoolchildren are granted access to structured learning during unforeseen emergencies such as COVID-19.

Process of the GPE Intervention

The GPE Accelerated Fund supported Nigeria with a COVID-19 response program on 'Continuing learning through alternate home-based platforms.' The intervention addressed gaps created by COVID-19 and issues arising from insurgency in Northeast Nigeria and the Indigenous People of Biafra secession. Both scenarios resulted in school closures and occasional nonattendance, which contributed to learning losses.

The GPE program was a teacher capacity development component and designed to enable teachers to utilize flexible digital and remote/home-based learning resources. The intervention began in 2021 with a needs assessment using pilot testing, materials development workshop, Master Trainers' training, and teachers' training aspect across 16 selected focal states in Nigeria.

A Teacher Training Committee, a sub-committee under the GPE COVID-19 response program, was assembled with the mandate to supervise "education system enhancing systemic capacity and preparedness response against the pandemic for children's safety and wellbeing and resilience for future shocks" (TRCN, 2021b, p. 4). Committee members comprised TRCN, National Teachers Institute, National Education Research and Development Council (NERDC), Universal Basic Education Commission, National Commission for Colleges of Education, UNESCO, Federal Ministry of Education-Federal Education Quality Assurance Service and TRCN Content Developers (Axiom Learning). Notably, a training needs assessment was conducted ab initio to ensure digital training was all encompassing and designed to fit teachers' identified digital skills gaps. The fund for teachers' training in identified states were released in batches, so trainings were also phased into batches. The State Ministries of Education and State Universal Basic Education Board (SUBEB) in focal states were contacted to nominate eligible teachers, and nominees were invited to the programme in cohorts.

Additionally, Computer Based Testing (CBT) centers that fell within the baseline standard for effective delivery of a digital literacy course. Identified facilitators received a one-day virtual Training of Trainers (TOT) session to ensure hitch-free training at CBTs.

Overall program aims were the following:

- to bridge the gap created by outbreak of the pandemic that severely affected the country's education system;
- to provide capacity development opportunities for teachers and school leaders to deploy technology in classrooms and distance learning methods using both online and offline modalities to continue learning;
- to train teachers and school leaders in emergency preparedness and response to provide safe school practices including COVID-19; and,
- to build resilience against future shocks.

Pilot Testing

The committee commenced a Teacher Needs Assessment (TNA) in five basic education institutions within two area councils of the Federal Capital Territory (FCT): Abuja Municipal Area Council and Bwari Area Councils of the FCT with a total of 501 respondents (teachers). The exercise lasted a week March (2021b). Ten data collection officers (5 per Area Council) visited ten purposely selected schools—six primary and four junior secondary—to collect and collate data. A checklist/instrument titled "GPE COVID-19 response: Continuing Learning through alternative home-based platform - Teacher Needs Assessment (TNA)" was developed and administered to teachers. The instrument had a bio-data section and nine other sections: (1) general awareness of the digital ecosystem; (2) presentation for in-person and remote learning; (3) use of MS office, Google Apps and IT support for teaching and learning; (4) use of technology for CPD; (5) use of internet for educational/ instructional research and content creation; (6) integration of ICT for teaching and learning; (7) use of multimedia for teaching and learning; (8) challenges to using ICT in teaching and learning; and (9) access to digital infrastructure.

Findings from the pilot study generally revealed that, although some respondents were aware of the digital ecosystem, 71.66% had not utilized it for teaching and learning purposes. Respondents were unable to complement lesson plans with digital tools and unaware of tools used for creating digital learning content. Respondents' schools had insufficient digital infrastructure. Most respondents had not attended training in the last five years, and the few who had were face-to-face. On average, respondents did not browse and search the internet to collect learning materials or resources for developing lessons; similarly, respondents did not believe use of ICT makes students concentrate more on their learning. Most respondents could not say whether insufficient number of internet-connected computers affects use of ICT in teaching because they did not use ICT in teaching. Most respondents did not have internet access in their schools.

The study revealed some gaps identified in Nigerian teachers' digital literacy levels, and those gaps were addressed in development of the training manual, including the following:

1. use of digital tools for complementing lesson plans
2. use of MS Office Suite for designing lessons, teaching, and creating presentation slides
3. process of content creation for TV or radio teaching
4. use of internet for collection of information, learning materials, or resources for teaching and learning
5. process of creating digital learning materials for lessons
6. use of ICT to provide feedback and/or assess students' learning
7. process of capturing and editing digital photos, movies, or other graphics for teaching and learning
8. use of emails, blogs, or websites
9. organization of computer files in folders and subfolders
10. creation of presentation with video or audio clips

11. online safety tips and ethical standards
12. use of multimedia for teaching and learning

Materials Development Workshop

A materials development workshop was conducted between 8th and 13th of November 2021. Members of the GPE sub-committee Teacher Training Committee reviewed the draft training manual and developed a final manual and guidelines for digital literacy training. According to TRCN (2021a) at the end of the workshop, the committee achieved the following:

- a robust digital literacy training manual and facilitators' guide.
- a monitoring work plan and activity schedule for monitors.
- a training programme of events; and,
- a concise identified role of partners in the training programme.

Professional Development: Why Is It Important?

Training and development are educational activities geared for improving individuals' job performance and comprise several stages including assessment, motivation, design, delivery, and evaluation. Training, according to Richards and Farrell (2005), refers to activities focused on present responsibilities with immediate and short-term goals in preparation for new responsibilities involving understanding basic concepts and principles to apply to the new assignment.

Professional development, on the other hand, is learning undertaken beyond the point of initial professional training (Craft, 2000). The process of professional development is for career growth. Barnard (2021) describes professional development as "something with great value and should be actively pursued by anyone wishing to be the best they can be in their profession" (par. 1). Professional development enables career progression and positions people to be authorities and eventual mentors in their careers. Additionally, professional development allows people to remain topical in their chosen fields, build confidence and credibility, develop leadership skills, increase efficiency, build networking, and acquire new skills. Therefore, many professions, such as teaching, require professional development for their members in the renewal of licenses to keep their members abreast of trends and topically relevant. Professional development can take the form of workshops, seminars, virtual presentations, and even professional meetings. To support innovativeness and effective teaching and learning, teachers constantly need to be involved in professional development (Boudersa, 2016). Programmes such as GPE Master Trainers' Training are necessary ingredients to support innovative and beneficial teaching.

Figure 1. *The Continuing Professional Development learning cycle (Barnard, 2021)*

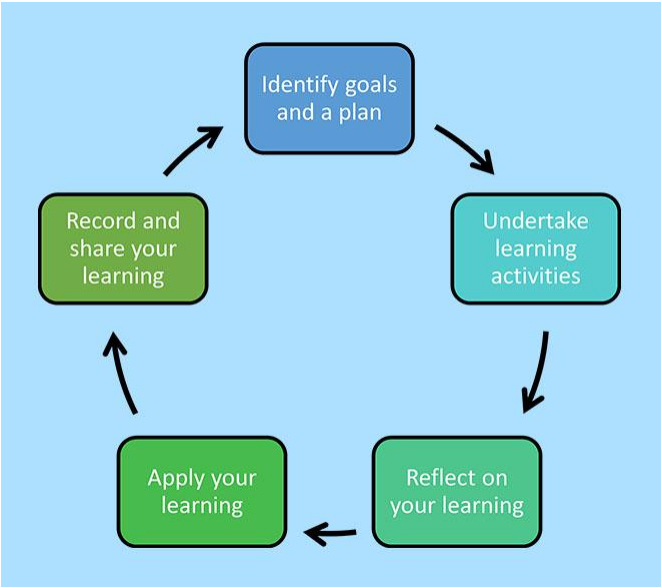


Figure 1 shows Continuous Professional Development (CPD) is individual-centered; thus, every teacher needs to be intentional with their professional development goals. Barnard (2021) succinctly stated professionals' validity and competence are determined through their commitment to CPD. Thus, the CPD journey entails planning, taking a giant stride toward obtaining desired knowledge, then applying the outcome of such knowledge to job execution for improved job performance.

Master Trainers' Training

The GPE/TRCN programme used materials already developed to train Master Trainers in a three-day training exercise. Training was held concurrently in eight locations in the 16 targeted states (Sokoto, Kaduna, Kano, Benue, Enugu, Katsina, Gombe and Plateau) at CBT centers for proper hands-on experience. Master Trainers were teachers and ICT focal persons in their various states selected by SUBEB. Of the targeted 480 individuals, 456 attended. Their capacities were built digitally with the plan of cascading their training to 30,000 teachers across the identified 16 states (TRCN 2022a).

At the conclusion of Master Trainers' training, the education sub-committee overseeing GPE intervention convened a steering committee meeting to evaluate Master Trainers' training. Reports from monitors—education sub-committee members who visited training centers to ensure compliance—and facilitators—ICT personnel designated to educate teachers of Master Trainers' training—revealed only a few trained Master Trainers were able to step down the training and conduct workshops for teachers. Therefore, the education sub-committee and GPE intervention funders decided to deploy some facilitators to assist Master Trainers in transferring their training to other teachers.

Teachers' Step-down Training (3 days each cohort)

Each state held eight identified teacher-training classes with one lead facilitator and two Master Trainers (MTs). Two monitors, eight facilitators and 16 MTs officially oversaw each cohort. Independent monitors from United Nations Children Fund (UNICEF) and FME were present at each training. Additionally, TRCN State Coordinators and key officers were on ground at all locations for assistance (TRCN 2022b).

Following discovery of MTs' incapacities, facilitators trained teachers in most locations. Exposure of MTs' deficiencies showed a deep level of digital ineptitude in Nigerian teachers and confirmed assertions by Tella (2007), Kumari and D'Souza (2016), and others regarding Nigerian teachers' digital illiteracy.

Outcomes of the GPE Programme on Beneficiary Teachers and Education in Nigeria

At the end of the GPE programme, capacity of teachers and school leaders improved in deployment of technology in classrooms and distance learning methods using both online and offline modalities to continue teaching and learning. Post-workshop evaluation found participants demonstrated high motivation and excitement with skills acquired from training. Further, participants' indicated in evaluations

- their training experience would improve their use of digital tools.
- technology would play a significant role in their teaching practice.
- more than 70% believed they had an intermediate skill in digital tools, while others could not adequately classify their skills levels.
- most were better equipped to deal with challenges of learning during periods of disruption.
- some expressed their learning can only transform into something beneficial if they were supported in the acquisition of digital tools or provided with digital infrastructure in their schools.

Since a majority of participants exhibited great enthusiasm and engagement during sessions on some digital apps, facilitators described training as beneficial. Although facilitators agreed tools provided for training were adequate, they feared what might happen once training was over.

Challenges and Lessons Learned

As much as GPE intervention recorded some success stories and positive impact on teachers, some challenges were noted, as listed below:

- Most teachers complained about non-existence of infrastructural tools in their schools; thus, going back to apply knowledge gained would be near impossible.
- A sizable number of teachers do not have functional mobile phones; thus, communication would be inhibited. Those who had phones lacked ability to connect to the internet to use simple digital applications such as WhatsApp and

Google Classroom for teaching and learning purposes. Moreover, their poor remuneration would not allow them to afford such 'luxuries.'

- Three days allotted for training of both Master Trainers and teachers seemed grossly inadequate for attainment of any significant learning; thus, more training days were suggested for subsequent training.
- Teachers and Master Trainers expected to receive laptops or smart phones to reinforce their learning; however, capacity building training did not incorporate provision of tools.

Based on observed challenges, analysis suggested subsequent interventions, such as providing digital tools for teachers to reinforce their learning and deploy acquired knowledge in their various schools. Further, analysis suggested teachers should dedicate a whole week for such training to ensure better understanding and mastery of concepts.

Conclusion and Recommendations for Further Interventions

Interventions such as GPE in Nigeria contributed greatly to reducing learning losses caused by COVID-19 and other disasters, such as civil insurgency. The relevance of partnerships between donor agencies and TRCN in accomplishing the Council's mandates cannot be underestimated, thus emphasizing the need for continued alliances. Stakeholders at the 2022 Digital Rights and Inclusion Forum faulted the Nigerian government for limited attainment of its digital revolutionary promises. The Forum called upon government for more partnerships with "industry players to avoid being left behind" (Daniel, 2022, par. 2) in the digital economy(newspaper). However, it is time Nigeria's government seriously considers the issue of building viable digital infrastructure in public schools to ensure the nation joins the comity of globalized worlds where a digital economy is well established. Such consideration will ensure teaching and learning are well institutionalized in the "digital space" (par. 3). Stakeholders in Nigeria's education sector emphasized "the need for more investment in capacity training for teachers, formulation of digital learning policy and provision of digital infrastructure to build a resilient educational system that could help mitigate learning losses occasioned by the COVID-19 pandemic or any other disruptions" (Lawal, 2022, p. 1). Limited investments in ICT infrastructure could lead to exclusion regardless of advancements in technology (Buabeng-Andoh, 2012).

Although the training goal for GPE intervention was largely accomplished, future interventions would benefit from recognizing some lessons learned. Additionally, school administrators who are key holders of school system should take advantage of such interventions by creating avenues for Internally Generated Revenues (IGRs). Resources from IGRs could be used to expand training for other teachers and support government efforts to acquire technological tools that aid digital teaching and learning. School administrators could also leverage service providers, suppliers, and other business stakeholders to deliver on their national Corporate Social Responsibility duties by helping schools provide training and build infrastructure to enhance quality education delivery.

The successful digital literacy training and experience could help improve delivery of training in other Nigerian states.

References

Ajayi, J.F.A., Kirk-Green, A. H. M., Udo, R. K. & Falola, T.O. (2022). Nigeria. In *Encyclopedia Britannica*. https://www.britannica.com/place/Nigeria

Barnard, D. (2021, August 1). *Professional development: Why is it important?* VirtualSpeech. https://virtualspeech.com/blog/what-is-professional-development

Boudersa, N. (2016). The importance of teachers' training programs and professional development in the Algerian educational context: Toward informed and effective teaching practices. *Journal of Expérience Pédagogique, 1*(1), 1–14.

Buabeng-Andoh, C. (2012*).* Factors influencing teachers' adoption and integration of information and communication technology into teaching: A review of the literature. *International Journal of Education and Development using Information and Communication Technology, 8*(1), 136–155.

Craft, A. (2000). *Continuing professional development: A practical guide for teachers and schools*. Routledge.

Daniel, E. (2022, May 04). Nigeria lags in digital infrastructure, right skills. *The Guardian*. https://guardian.ng/technology/nigeria-lags-in-digital-infrastructure-right-skills/

Federal Republic of Nigeria (2004). *National Policy on Education*. NERDC Press.

Ferri, F., Grifoni, P., & Guzzo, T. (2020). Online learning and emergency remote teaching: Opportunities and challenges in emergency situations. ***Societies***, *10*(86), 1–18. https://doi.org/10.3390/soc10040086

Global Business Coalition for Education. (2017, September 9). *Nigeria: Embracing literacy in a digital age*. Global Business Coalition for Education. https://gbc-education.org/nigeria-embracing-literacy-in-a-digital-age/

Kumari, S. N. V., & D'Souza, F. (2016). Secondary school teachers' digital and use of ICT in teaching and learning. *International Journal of Computational Research and Development, 1*(1), 141–146.

Lawal, I. (2022, June 30). 'Digital infrastructure, capacity training imperative for sector's development'. *The Guardian*. https://guardian.ng/features/digital-infrastructure-capacity-training-imperative-for-sectors-development/

Olanrewaju, G. S., Adebayo, S. B., Yetunde-Omotosho, A., & Olajide, C. F. (2021). Left behind? The effects of digital gaps on e-learning in rural secondary schools and remote communities across Nigeria during the COVID19 pandemic. *International Journal of Educational Research Open, 2*, 1–10. https://doi.org/10.1016/j.ijedro.2021.100092

Richards, J. C., & Farrell, T. S. C. (2005). *Professional development for language teachers: Strategies for teacher learning*. Cambridge University Press.

Teachers Registration Council of Nigeria. (2014). *Professional qualifying examination: National benchmark*. Federal Ministry of Education.

TRCN (2021a). *An executive summary on the 2nd phase of the GPE activities*. Submitted to UNICEF for the Material Development Workshop and Master Trainers Training, 8th – 26th November.

TRCN(2021b). *Teacher needs assessment (TNA) data analytic report*. The Data Analytical Report Documents for the GPE Project as well as Recommendations and Summary of the Captured TNA's data, March 25th.

TRCN (2022a). *Report on 1st batch activity of the 3rd phase of the GPE continuing learning. Being a report presented by TRCN (Lead Agency - Teacher Training Sub-Committee) to UNICEF, March 14*.

TRCN (2022b). *Report on the 2nd batch activity of the 3rd phase of GPE Continuing Learning. Being a documented report for the project in the four listed states of Ebonyi, Kano, Kebbi and Nasarawa as well as pictorial evidence including the summary of the data used for the report, 26th June.*

Tella, A., Tella, A., Toyobo, O. M., Adika, L. O., & Adeyinka, A. A. (2007). An assessment of secondary school teachers' uses of ICT's: Implications for further development of ICT's use in Nigerian secondary schools. *The Turkish Online Journal of Educational Technology, 6*(3), 5–17.

United Nations. (2019, October 18). Nearly half of world's population excluded from 'benefits of digitalization', speaker stresses as second committee debates information technology for development. *United Nations Meetings Coverage and Press Releases*. https://press.un.org/en/2019/gaef3523.doc.htm

Worldometer. (2022). Population of Nigeria 2020. https://www.worldometers.info/world-population/nigeria-population/

INTERNATIONAL TEACHING EXPERIENCES: INSTRUCTOR LEARNING AND INSIGHTS FOR LEADING FACULTY-LED PROGRAMS ABROAD

Joellen E. Coryell[1]
Cheri Hatcher[2]

ABSTRACT: The need to develop international cross-cultural perspectives has led many educators to create study abroad programs for their learners. One way to support this learning in adult higher education is to offer education abroad programs – often short-term international field experiences led by faculty for adult students. In the current study, we investigated experiences of adult education/HRD faculty who have experience teaching in such programs; additionally, we explored what and how they have learned in order to do so. Through the amalgamated conceptual framework of learning readiness, communities of practice, and motivational learning theory, we offer preliminary analyses of interviews conducted with five tenured/tenure-track faculty members about their motivations and professional development in advance of leading these programs.

Keywords: study abroad, cross-cultural perspective, short-term international field experiences

Global intersections of societies, economies, politics, and workplaces have been developing for quite some time, and higher education has followed suit. Universities are globalizing through engaging in international research endeavors, welcoming international scholars and students to work and learn on their campuses, internationalizing the curriculum, and providing study abroad programs and international field experiences (Coryell, et al., 2012). Likewise, adult education and human resource development (HRD) faculty around the United States are infusing global perspectives in their curricula as well as through study abroad opportunities. Study abroad engagements in adult education related graduate programs are often led onsite by faculty and of short-term duration to accommodate nontraditional students/working adults who cannot afford the time and costs associated with longer study abroad programs (Chieffo & Griffiths, 2009; Coryell, 2011).

Faculty who teach in international field-based programs participate within a variety of communities and contexts that may (or may not) help prepare them to teach their students while embedded in another culture and country (Coryell, 2013). We, the researchers, have been studying international cross-cultural adult and higher education and began to wonder about programs offered by university adult education and HRD faculty. Specifically, we sought to understand why and how instructors learn to develop and teach effectively in global educational environments. The purpose of the current research, therefore, was to investigate motivations, preparations, and learning experiences, activities, and outcomes in which faculty in our field engage when preparing for and

[1] Department of Counseling, Leadership, Adult Education & School Psychology, Texas State University, coryell@txstate.edu
[2] Department of Counseling, Leadership, Adult Education & School Psychology, Texas State University, chatcher@txstate.edu

teaching in international settings. We asked, *"What are the motivations adult education and HRD faculty have to teach students abroad?"* and *"How and with whom have they learned about and prepared to teach students abroad?"* We assert the benefit of learning about these professors' experiences in adult study abroad programs will assist our field in understanding linkages between international field experiences and faculty development. Further, our findings and subsequent discussions may assist the larger community of international education scholars and practitioners to link adult learning theory with international, cross-cultural educational approaches. In the following sections we offer a brief overview of research literature and our theoretical framework, our methodological choices, and our preliminary findings. We provide a brief discussion of the findings and implications of our study.

Conceptual Framework

Their readiness to learn may be critical to faculty members' engaging in leading study abroad programs. Pratt and Associates (1988) ratified adults generally become ready to learn when their life situations create a need to know; further, the authors recognized most learning experiences are highly situational, and a learner may exhibit different behaviors in different situations. In his work, Pratt and Associates identified two critical core dimensions of adult learning: *direction and support,* acknowledging learners may have fundamentally different needs in the learning process. Regardless of adults' competency or confidence, learning is *situational*, and a plan for direction and support is important (Knowles et al., 2020).

Our framework included tenets from corresponding theories: situated learning (Lave & Wenger, 1991), communities of practice (CoPs) (Wenger, 1999), and motivation theory as explicated by Legault (2016). Situated learning helps us to understand people's values, beliefs, actions, resources, and contexts influence their interactions, co-constructed learning, and development within communities of practice. CoPs are a group of individuals who share interests and engage in collective learning endeavors in a common domain (shared identity of interest), with a community (people who interact through activities and dialogue to share information and learn from each other), involving communal practices (the actions, behaviors, values, resources, tools, narratives, and solutions shared within the community) (Wenger-Trayner & Wenger-Trayner, 2015). We acknowledge the social nature of learning, as well as the interdependency adults have in community to co-construct knowledge and to reflect and individualize learning for growth and development. Importantly, in this research 'learners' are the adult education/HRD faculty who develop and teach in adult study abroad programs.

Finally, common theories of learning motivation include extrinsic and intrinsic motivation (Gopalan et al., 2017; Legault, 2016; National Academies of Sciences, Engineering, and Medicine, 2018). Extrinsic motivation refers to factors external to the person, such as reward or pay (or tenure and promotion), social or professional recognition, and praise. Intrinsic motivation is a type of motivation that occurs within the individual. Personal gratification and a feeling of accomplishment are examples of intrinsic motivations.

Brief Literature Review

Research literature strongly supports the positive impact study abroad experiences have on students' lives. For example, the influence of study abroad participation on learners' ability to acquire 21st century professional skills is well supported (Dresen et al., 2019; DuVivier & Patitu, 2017; Liwiński, 2019; Moldenhauer et al., 2021; Sisavath, 2021). Among the advantages to students, educative student study abroad participation offers competitive professional advantages and—during economically challenging times—employers seek employees with competitive enhancing characteristics (Liwiński, 2019). To prepare students for the workforce, higher education institutions are engaging in internationalization strategies to help students develop global competencies that align with new professional requirements and heightened citizenship expectations (Agnew & Kahn, 2014; Curtis & Ledgerwood, 2018). Additionally, one of the central strategies for internationalization in higher education is developing ways of broadening the academic experiences of students *and* academic staff (Knight, 2004; Stier, 2004). While there is a large body of literature championing the student experience, there is sparse literature supporting professional preparation of the faculty who develop and lead study abroad programs; there is even less research about the experiences of faculty leading adult students in study abroad programs.

While a general acknowledgment of the importance of faculty professional development is implied across the literature, very little exists detailing what it should encompass in preparation for leading international field experiences (Gözpinar, 2018; Tovar & Misischia, 2020). Many articles in existing literature describe the pitfalls of traveling with (undergraduate) students, highlight the importance of reflection throughout the program, and those creating checklists for pre-departure preparation; however, little details the type of professional development needed when working with adult students (graduate and doctoral) in educative study abroad programs. Alternatively, a uniquely dystopian perspective emerged in an article by Madden et al. (2019) who wrote from a Jungian shadow archetype perspective and contended the institution does not adequately prepare faculty to manage potential shadow risks (legal, relational, and professional) and shadow costs (temporal, financial, and physiological) when participating in study abroad programs. Madden et al. (2019) conclude by saying, "to mitigate reputational risk, the strongest advice from respondents was to get involved with study abroad only after tenure, and lastly, they recommend that faculty 'don't recreate the wheel'" (pp. 194-195).

Perhaps one explanation for the lack of research centering on professional development of faculty leading adult students in study abroad programs relates to the low number of graduate and doctoral students accessing and participating in study abroad programs. According to the Institute of International Education (IIE) (2021), 162,633 students studied abroad in 2019/2020 (nearly a 50% decrease from the prior year due in part to the COVID-19 global pandemic). As well, while IIE reported graduate students participating in study abroad programs are an important and growing area of international education (Sanger & Mason, 2019), less than 10% of those who participated in study abroad programs in 2019/2020 were graduate students. This small subset of graduate students

may garner less attention in research and, therefore, may be a contributing factor to the lack of literature detailing professional development of adult educators working with adult students in study abroad programs. Notably, in a review of literature Voges (2015) asked about methodological shortcomings that could be identified "in assessing influences on study abroad participation for adult and higher education learners in the last 20 years of research, and what tentative solutions can be offered to encourage study abroad participation by adult and higher education learners in the US and globally?" (p. 2). Perhaps answers to Voges' questions lie partly in data collection of this study and in creating rich faculty development programs designed to engage adult student participation; such programs should recognize that faculty must be prepared to intervene in the meaningful construction of curriculum pre-departure (internationalization at home), during the experience (in-country learning), and after learners have returned home (reflection) (Coryell, 2013).

Methodology

We employed an interpretive phenomenological method (van Manen, 2014) in this study. This approach helps us explain, understand, and interpret participants' experiences. After securing IRB approval and sending out recruitment emails to the Commission of Professors of Adult Education, our initial participant pool consisted of five professors of adult education and human resource development. Inclusion criteria required participants to be associated with an adult education, adult and higher education, workforce education, human resource development, or closely related university graduate program and to have conducted/taught in an international field experience/study abroad program at least once. Interviewees were three women and two men. All were tenured or tenure-track; two of the participants were full professors, two were associate professors, and one was an assistant professor at the time of the interviews. The five were working in diverse universities comprising research-intensive academies inclusive of minority-serving institutions (one was a historically Black college/university) and land-grant universities.

A semi-structured protocol guided the interviews, which were conducted and recorded virtually using web-conferencing software. Interviews lasted on average about 80 minutes each and were transcribed for coding. Researchers watched and rewatched each interview, then read and reread the transcriptions to get an overall sense of the data and to begin identifying sensitizing concepts, "those background ideas that…offer ways of seeing, organizing, and understanding experience" (Charmaz, 2003, p. 259) and preliminary codes. Subsequently, constant-comparison (Glaser & Strauss, 1967) and thematic qualitative analyses (Saldaña, 2009) were used to analyze the data within each interview and across the entire data set.

Findings

Faculty in this study taught in courses that were short-term (generally 1 to 3 weeks) in locations including Thailand, Russia, Vietnam, Netherlands, France, and Mexico. Two of the participants had taught their program once, two participants had taught in two or three programs, and one participant had taught in nine programs in multiple countries. Here we address preliminary findings for each research question.

What Are the Motivations Adult Education and HRD Faculty Have to Teach Students Abroad?

Unique International, Cross-Cultural Student Learning Opportunities

Motivations to teach students abroad varied but related to a desire to offer learners opportunities for participation with cultural communities and experiences in comparative and authentic ways that engaged real-world issues, problems, and projects in adult education and HRD. Program goals included opportunities to investigate immigration and gender issues in Mexico, to develop authentic language learning activities for immigrants in the Netherlands, and to compare nuanced understandings of leadership across organizations and educative experiences in Thailand. Three professors developed international experiences so students could learn about and interact with cultures and communities that were different, yet similar, to their own. These included students of color studying Black existentialism and sense of Blackness in Paris; heritage, culture, societal issues, and Spanish language in Mexico for learners from United States–Mexico border state communities; and water quality testing and language learning exchange between indigenous Russians and Native Americans.

All participants acknowledged many of their adult students had never travelled abroad prior to the course, so offering these learning experiences may be the first—perhaps only—opportunity for students to gain "experience of being in an international context," "a quite expansive approach to internationalizing experiences," and to "share global mindsets" about their academic discipline. Importantly, participants realized the chance to broaden perspectives, challenge stereotypes, and reflect about oneself and one's own culture through the lens of living and learning abroad. One participant noted "there's such a narrative in this country (U.S.) about what it (immigration in Mexico) is and what it isn't that [the study abroad program] was basically myth busting. And so, we wanted to see how it was from [the Mexican] perspective." Another offered, "one of the neatest experiences the students had was with local people; they were coming up to them and saying, 'You look like another member of my family'…just you know by laying eyes on each other was a really cool thing."

Personal and Professional Motivations

Additionally, study participants had personal and professional motivations to develop and teach in these programs. With differing life and work trajectories, three of the five participants had previously lived, worked, or travelled to their programs' foreign locations. The experiences they offered students were an extension of their personal motivations to be in those places, too, in part because of relationships they had built with people and organizations abroad. One participant shared, "I love Thailand, and I've missed Thailand. I have so many friends and contacts there…I want to go back all the time!" Another offered, "I had been going [to Vietnam] several times to do faculty development workshops around teaching and learning…we had all kinds of connections all across the country…we created out of that an opportunity." A third explained Mexico and an organization with which she had worked previously, "fit with us

perfectly…there's a heritage with that institute with adult education." Other participants explained offering study abroad for students came from a history of travel experiences, including previous international work histories, that had sparked "curiosity" and a need to continue "looking at ourselves and our assumptions [at] a deeper level."

Finally, all participants highlighted professional motivations for engaging in this work. Motivations included opportunities to conduct research and explore adult learning in new ways. One interviewee suggested programs "gave us a chance to talk about research and about *not knowing*…how research isn't putting down what you already know but going somewhere that you don't know," while another offered, "I was being driven by this deep desire to understand this very interesting way of learning, and what could possibly result from that sort of experience." The opportunity to help increase awareness of international education and globalize the campus were also identified as motivations. Respondents offered, "there was a chance to help globalize my campus…[and] our faculty;" and create a "formal attempt" to understand and lead international graduate learning experiences and outcomes. One participant indicated this work was meaningful because it can give "exposure on campus…from a tenure and promotion standpoint." Finally, one participant acknowledged, "that year had been a rough year for me personally. I needed to reconnect with this thing called *adult education* this thing called just *being a faculty member*. I felt like I needed that more than I realized." Participants recalled the excitement of fresh perspective-taking on culture, on curriculum, and on adult education and HRD through these programs.

How and with Whom Have They Learned About and Prepared to Teach Students Abroad?

Formal Training and Previous Workplace Learning

Invariably, participants explained they learned how to teach abroad through "a confluence of things." Participants called upon various formal training and previous work experiences, earlier travel in the foreign locale, and—importantly—mentorships, relationships, and collaborations. One participant attended training for faculty-led study abroad through the university and from a third-party provider of education abroad services. Others mentioned university programs and workplace learning that included attending undergraduate and Master's programs in international training, teaching English as a foreign language, and working in university international offices abroad. Four of the five participants, however, acknowledged they did not "pursue any special formal training" specifically for teaching abroad.

Previous In-Country Experience

Three of the five participants believed their in-country experiences prior to leaving for the study abroad program were helpful in their preparations for teaching abroad. These foreign trips included cross-cultural learning from personal or professional travel years before the study abroad program or pre-program trips to set up program logistics and work with colleagues/partners. Participants stressed the importance of having a "good

relationship" with in-country collaborators and "to know the place…to have already been everywhere…so that you're grounded when you go…[and] how to coordinate with organizations and site visits."

Mentors, Co-Instructors, Partners

Importantly, across the data set the most prevalent way the participants discussed having learned about and prepared to teach abroad was by working with mentors, co-instructors, or in-country partners. Mentors were faculty members at their institutions experienced with faculty-led study abroad and who shared knowledge of the importance of "[how] to design the program," "student recruitment," "planning organization," "building the syllabus," "finding course materials…embedded in the cultural context," and ultimately "walking me through everything, and like here's the pitfalls." Interviewees were clear that co-instructors were also essential. Statements illustrating this point include, "You really do need a partner…to sort of bounce things off from," and "You always want to have a partner, just in case something goes wrong…you want to have another person there…you know you're dealing with 10 to 15 people on their trip, so you don't want it all to be relying on one person."

Additional Insights on Course and Learning Design

We found participants did not generally design in-country learning experiences with a strict structure. While each had course objectives and assigned learning resources, specifics of learning activities, interactions, projects, and other functions while abroad were often "natural and just sort of spontaneous," not always "intentional," and "a little bit like ad hoc sometimes." Having flexibility regarding learning while in the foreign setting was stressed as essential for "authentic," cross-cultural educative experiences.

Discussion and Implications

In linking with our conceptual framework, the findings of this study point to participants' readiness to engage in new learning opportunities for both themselves and their adult learners through short-term study abroad experiences. Their motivations to do so were primarily intrinsic, connected to relationship, experiences, and prior learning about a foreign context, and were deeply embedded in the desire to offer adult students international learning experiences for their professional and personal growth.

Findings also help us characterize the domain, community, and practice in teaching and learning experiences. The *domain* is seen as a shared interest (faculty and adult learners) in student and personal learning and experience with international cultures. We also ascertained participants' personal interests differed yet weighed-in significantly with motivations to engage in this learning (Pratt & Associates, 1998) and teaching and the choices of location and content/curricular aspects of programs they developed. The *communities* with which our participants interacted and learned comprised mentors from participants' doctoral programs, other more senior and experienced university co-workers (Knight, 2004; Stier, 2004), and local, faculty, and organizational partners in the foreign

setting. Essential to these communities were *practices* and *valuing* of relationship building, developing global perspectives, and collaboration and co-construction of learning and teaching as a faculty member.

The CoPs in which our interviewees participated were essential to their own professional development for teaching in these programs. What we found missing, though, was a link to the larger community of United States-based adult education/HRD professors who were also doing this work. What might we learn together as a field, and perhaps within the Commission of Professors of Adult Education, with a more intentional CoP of adult education study abroad faculty practitioners?

The findings also provide insights into how the discipline—and our universities—might assist in professional development of future adult education/HRD faculty who are motivated to develop a study abroad program for learners. Participants chose to engage their energy and expertise to lead these international experiences with varying levels of administrative and faculty support and professional development. Future support for others interested in designing and teaching adult study abroad programs should include informal and nonformal learning opportunities, networking to learn from other CoP members about developing these programs, planning curricula and learning activities within the foreign city as a classroom (Coryell, 2011), establishing and building relationships with foreign colleagues and organizations, and avoiding personal, professional, and legal risks along the way (Madden et al., 2019). Opportunities to co-teach in cross-institutional collaborations may additionally evolve from this CoP.

The study's limitations certainly include the small number of participants. Thus, we continue to conduct interviews with additional participants and hope to expand our findings with their perspectives on motivations and preparations and report insights about the personal and instructional learning and changes adult education/HRD faculty have undergone through the experience of teaching in study abroad programs. Ultimately, we hope the investigation will help the field build strong faculty development approaches and support so more international education opportunities will be offered for both faculty and student participants.

References

Agnew, M., & Kahn, H. E. (2014) Internationalization-at-home: Grounded practices to promote intercultural, international, and global learning. *Metropolitan Universities, 25*(3), 31–46. https://journals.iupui.edu/index.php/muj/article/view/20580/20180

Charmaz, K. (2003). Grounded theory: Objectivist and constructivist methods. In N. K. Denzin & Y. S. Lincoln (Eds.), *Strategies for qualitative inquiry* (2nd ed., pp. 249–291). Sage.

Chieffo, L., & Griffiths, L. (2009). Here to stay: Increasing acceptance of short-term study abroad programs. In R. Lewin (Ed.), *The handbook of practice and research in study abroad: Higher education and the quest for global citizenship* (pp. 365–380). Routledge.

Coryell, J. E. (2011). The foreign city as classroom: Adult learning in study abroad. *Adult Learning, 22*(3), 4–11. https://doi.org/10.1177/104515951102200301

Coryell, J. E. (2013). Learning on-location: Evaluating the instructional design for just-in-time learning in interdisciplinary short-term study abroad. *Journal on Excellence in College Teaching*, *24*(2), 5–31.

Coryell, J. E., Durodoye, B., Wright, R. R., Pate, P. E., & Nguyen, S. (2012). Case studies of internationalization in adult and higher education: Inside the processes of four universities in the US and UK. *Journal of Studies in International Education*, *16*(1), 75–98. https://doi.org/10.1177/1028315310388945.

Curtis, T., & Ledgerwood, J. R. (2018). Students' motivations, perceived benefits, and constraints towards Study Abroad and Other International Education Opportunities. *Journal of International Education in Business*, *11*(1), 63–78.

Dresen, C. K., Wilmes, M. L., Sullivan, K. R., & Waterbury, T. A. (2019). Building resilience through strengths-based learning during graduate study abroad: An exploratory study. *Journal of Experiential Education*, *42*(3), 297–310. https://doi.org /10.1177/1053825919861414

DuVivier, R., & Patitu, C. (2017). Effects of study abroad on graduate student dispositions, knowledge and skills. *College Student Affairs Journal*, *35*(2), 15–28. https://doi.org /10.1353/csj.2017.0010

Glaser, B. G., & Strauss, A. L. (1967). *The discovery of grounded theory: Strategies for qualitative research*. Aldine.

Gopalan, V., Abu Bakar, J. A., Zulkifli, A. N., Alwi, A., & Mat, R. C. (2017). A review of the motivation theories in learning. *Proceedings of the American Institute of Physics*. https://doi.org/10.1063/1.5005376

Gözpinar, H. (2018). School education projects experiences: Fostering lifelong learning as a person and a professional. *Journal of Language and Literary Studies*, 21, 155–175.

Institute of International Education. (2021). *Profile of US study abroad students, 2000/1 – 2019/20. Open doors report on international educational exchange*. https://www.opendoorsdata.org

Knight, J. (2004). Internationalization remodeled: Definition, approaches, and rationales. *Journal of Studies in International Education*, *8*, 5–31.

Knowles, M. S., Holton III, E.F., Swanson, R.A., & Robinson, P.A. (2020). *The adult learner: The definitive classic in adult education and human resource development* (9th ed.). Routledge.

Lave, J., & Wenger, E. (1991). *Situated learning: Legitimate peripheral participation*. Cambridge University Press.

Legault, L. (2016). Intrinsic and extrinsic motivation. In V. Zeigler-Hill & T.K. Shackelford (Eds.), *Encyclopedia of personality and individual differences* (pp. 1–4). Springer. https://doi.org/10.1007/978-3-319-28099-8_1139-1

Liwiński, J. (2019), Does it pay to study abroad? Evidence from Poland. *International Journal of Manpower*, *40*(3), 525–555. https://doi.org/10.1108/IJM-11-2017-0305

Madden, T. M., McMillan, A., & Madden, L. T. (2019). This is not a vacation: The shadow side of study abroad programs for faculty. *Journal of Management Education*, *43*(2), 185–199. https://doi.org/10.1177/1052562918815212

Moldenhauer, L., Osland, M., & Waterbury, T. (2021). Study abroad strengths-based curriculum: Advancing self-reflection and relationship-building leadership skills. *Frontiers: The Interdisciplinary Journal of Study Abroad*, *33*(2), 79–92. https://doi.org/10.36366/frontiers.v33i2.637

National Academies of Sciences, Engineering, and Medicine. (2018). *How people learn II: Learners, contexts, and cultures.* The National Academies Press.

Pratt, D. D., & Associates. (1998). *Five perspectives on teaching in adult and higher education*. Krieger.

Saldaña, J. (2009). *The coding manual for qualitative researchers*. Sage.

Sanger, J., & Mason, L. (2019). *Who's counting? Understanding the landscape of graduate learning overseas. Institute of International Learning*. https://www.iie.org/Research-and-Insights/Publications/Understanding-the-Landscape-of-Graduate-Learning-Overseas

Sisavath, S. (2021). Benefits of studying abroad for graduate employability. *Journal of International Students*, *11*(3), 547–566. https://doi.org /10.32674/jis.v11i3.2779

Stier, J (2004). Taking a critical stance toward internationalization ideologies in higher education: Idealism, instrumentalism and educationalism. *Globalisation, Societies and Education*, *2*(1), 1–28. https://doi.org/10.1080/1476772042000177069

Tovar, L. A., & Misischia, C. (2020). Short-term travel study: Program design, student self-awareness and faculty development. *Research in Higher Education Journal*, *38*, 1–14.

van Manen, M. (2014). *Phenomenology of practice: Meaning-giving methods in phenomenological research and writing*. Left Coast Press.

Voges, S. N. (2015). Revisiting the literature on study abroad participation in adult and higher education: Moving beyond two decades and two percent. *The International Education Journal: Comparative Perspectives*, *14*(1), pp. 57–70.

Wenger, E. (1999). *Communities of practice: Learning, meaning, and identity*. Cambridge University Press.

Wenger-Trayner, E., & Wenger-Trayner, B. (2015). *Introduction to communities of practice: A brief overview of the concept and its uses*. https://wenger-trayner.com/introduction-to-communities-of-practice/

CELEBRATING THE INFLUENCE OF KNOWLES' ANDRAGOGY ON DR. CLINTON LEE (ANDY) ANDERSON AND MILITARY (ARMY) EDUCATION: A TRIBUTE

Grey Edwards, Ph.D.[1]
John A. Henschke, Ed.D.[2]

ABSTRACT: This paper presents a summary of Dr. Clinton Lee (Andy) Anderson's 40+ years Military (US Army) Educator Service implementing Dr. Malcolm S. Knowles' perspective on andragogy. Some specifics of Anderson's implementation include five Adult Basic Education (ABE) characteristics of facilitating Knowles' andragogy, six differences between teaching and facilitating adult learning and teaching children, fourteen self-actualization of andragogical, self-directed learning initiatives implemented in US Army education, ten general characteristics of adult learning in andragogy, and fifteen directions of growth in ABE learners' maturation.

Keywords: andragogy, military adult basic education, honoring Anderson & Knowles

Dr. Clinton Lee "Andy" Anderson is the primary reason a strong adult education program in the military worldwide exists; he spent over 40 years of his adult life building programs for military and civilian adult learners. In Anderson's early years teaching the Reserve Officer Training Corp (ROTC) at Stanford University (1969-1972), he embraced Dr. Malcolm Knowles' andragogical learning theory of how adults learn, which was radically different from pedagogical learning. This andragogical theory/model of learning affirmed adults as independent, motivated internally, responsible, and self-directed learners, different from the pedagogical theory/model of learning affirmed as dependent, subject-centered, motivated externally, and teacher-directed seen in children. As Anderson continued his own journey with lifelong learning, he was able to earn two Master's degrees—in History, University of North Carolina, 1962; in Education, Stanford University, 1972—and was awarded a PhD in Adult Education from Columbia University in 1985. Anderson's PhD work at Columbia University was done through a cohort entitled "Adult Education Guided Intensive Study" (AEGIS) under Dr. Jack Mezirow.

In Anderson's first interview with the then-AEGIS cohort leader, Mezirow asked Anderson what previous experience he had in Army Education. Anderson immediately replied he had an extensive résumé of 24 years' experience as an officer and strong supporter of army education programs with direct, hands-on involvement. Without hesitation, Mezirow said, "If you do your dissertation on the history of adult basic education (ABE) in the Army, I will sponsor you." Thus, the topic for Anderson's dissertation was decided on day one. Mezirow took a special interest in Anderson's work and was head of his dissertation committee, which included Dr. Steven Brookfield, Dr. Philip Fey, and Dr. David Harmon.

[1] grey_edwards@hotmail.com
[2] Emeritus professor of andragogy at Lindenwood University, St. Charles, MO. E-Mail: JHenschke1@lindenwood.edu; Web: http://www.umsl.edu/~henschke/

Anderson began his adult education life as a military officer assigned to the Education Directorate of the Adjutant General in 1976. Anderson spent his early years in the Education Directorate specifically overseeing development and implementation of the Basic Skills Education Program (BSEP), a major career accomplishment. Urgency for increasing BSEP resulted from many recruits' sorely lacking literacy and numeracy, thus hampering their own development and impacting the Army's mission. BSEP's success led to Anderson's promotion to Chief of the Program and Operations Division, where he served until retirement as a Lieutenant Colonel in 1982. Anderson continued his service as a civilian after retirement. His active-duty Army years provided a 24-year building block for bigger accomplishments in armed forces education as Anderson continued to touch the lives of many through his military-focused voluntary education activities.

Andy Anderson held a number of important professional positions in developing, managing, and reviewing education programs for servicemembers. These positions included work with the American Council on Education (ACE) and Servicemember Opportunity Colleges (SOC). Anderson established a national reputation as a scholarly and tireless advocate for servicemembers' and veterans' education. He provided strong arguments for educating, as well as training, servicemembers. Anderson's contact with outstanding civilian educators such as Knowles aided in bringing a positive light to military adult education. With his high standards, Anderson provided oversight for ensuring quality in every program or project with which he was involved. Anderson insisted servicemembers get the same standard of education as their civilian counterparts. He contributed greatly to the Council of College and Military Educators (CCME), the Council of Military Education and Training (CMET), the American Association of Adult and Continuing Education (AAACE), and the International Adult and Continuing Education Hall of Fame (IACEHOF). Dr. David Pierson recalled while serving as president of several organizations he was honored to work closely with Anderson (Edwards & Pierson, 2022).

Dr. Anderson also spent much of his adult life constructing a military voluntary community. Beginning as an Army Officer in the Education Directorate of the Department of the Army and continuing with service as a civilian after retirement from active duty in 1982, Anderson spent 50 years in voluntary education. His success in working with civilian educators inside and outside the Army while developing the BSEP led to Anderson's promotion as Chief of the Program and Operations Division of the Education Directorate for the Department of the Army.

After military retirement, Anderson plunged immediately into further military voluntary education as he completed his Doctorate in Adult Education at Columbia University with Stephen Brookfield as his Major Professor. Anderson also had the opportunity to work with the foremost leaders of Adult Education, including Knowles. Anderson began a series of collaborations with major higher education organizations, working as a consultant with the US Department of Education, the American Association of State Colleges and Universities (AASCU) and ACE. During this period, Anderson impressed many in the civilian higher education community with the seriousness and value of military voluntary education. Indeed, not a single major departure in voluntary military

education from the time Anderson retired from the Army occurred without the stamp of his opinion. In all the processes where Anderson served, he was a watchdog for quality. Anderson insisted that service members get the same standard of education as their civilian counterparts. After consulting in national higher education for many years, he joined the SOC staff in 1998. Anderson quickly took charge of the development and implementation of the SOCMAR program designed to streamline credit award and transferability for Marines pursuing college degrees. After success with this program, Anderson did the same for the Coast Guard, eventually accomplishing the same program for the entire Army education system and broadening the opportunities for thousands of servicemembers.

Andy Anderson's passion for military adult voluntary education also shone in his community building activities. Anderson became a thought leader in the field not just by his actions, but also through writing. He published numerous articles and reports highlighting the important and positive impact military voluntary education has had in development of the adult and continuing education field. In addition, Anderson was an energetic participant in several professional associations supportive of improving the stature and skills of military educators, including CCME, AAACE, and the division of CMET. For twelve years, Anderson was editor *The Military Educator*, a newsletter that is a major source of information on activities and events throughout the broad military education community, keeping all participants informed. Anderson received many awards as a military and civilian educator recognizing his service in building the military voluntary education community. These include the 1993 Tilton Davis Military Educator of the Year Award and Induction into the International Adult and Continuing Education Hall of Fame in 2000. Dr. Grey Edwards added a personal note at the IACEHOF induction:

> It is an honor to write some thoughts and memories of such a dear man. It was so special to have been around him as a friend, colleague, mentor, leader, and inspiration for 35 years. The sad recent passing of Andy was a tremendous loss, and he will always be missed and remembered. *The Chronicles of a Weary Traveler*: *The Life Story of Clinton Lee Anderson* is a wonderful 238-page scrap book of life about our dear friend. The 3-page "Introduction" to the book by his close friend Dian Stoskopf is heartwarming about what a special person Dr. Clinton "Andy" Anderson was to so many. You will always be in our thoughts, prayers and memory. Love, *Grey* (G. Edwards, personal communication, 2020)

Knowles' Andragogical ABE Adapted by Anderson for Use in the US Army

Information in this section is largely garnered from Knowles' publications listed in the "References" section of this paper. Consequently, not all Knowles' materials have citations here. However, this paper's authors have updated some of the expressions so they may be understood in the language of 2022 (i.e., in the documents where 'he' was originally used, the authors of this paper replaced it with the pronoun 'they').

Understanding characteristics of the Adult Basic Education (ABE) learner is fundamental to effective teaching or facilitating andragogical learning with adults in ABE programs. The instructor (or facilitator) also needs to know some techniques for coping with these characteristics. This material is mostly found in Knowles (1973) and Henschke (1989). The five important characteristics are: 1) immediate concerns, 2) low self-esteem, 3) different value systems, 4) use of defense mechanisms, and 5) sensitivity to non-verbal communication.

These five characteristics may be found to some degree in all adults. Many characteristics unique to adults with limited education point to specific implications for teaching techniques. Each instructor has an individual style for teaching (or facilitating adult learning); nonetheless, these techniques provide general guidance for acknowledging any clues relating to each of the identified characteristics. Skillful adult learning facilitators always consider these characteristics when helping adults learn how to learn.

Adults need to receive genuine concern and competent guidance. Both are essential for teachers to understand adult students' problems and instructional needs. The effective ABE teacher must perceive a problem as it may appear to adult learners. The teacher must also share students' goal expectations when diagnosing needs and guide learners in an instructional program.

Adults need different instructional approaches. Teachers/facilitators must realize adults are different from children. The same techniques used in teaching children are not necessarily effective with adults, although many of the methods are highly effective. Knowles made the distinction between teaching theories for children and adults by developing the term *andragogy*—borrowed from the Greek language—and applying it to the new technology for the study of adults. Knowles stated andragogy is premised on at least six basic differences between facilitating learning of adults and children.

Six Basic Differences Between Teaching Adults and Children

1. Why learn something: Adults need a reason that makes sense to them to justify their learning something, not just because the teacher said so.

2. Experience: Accumulates a growing reservoir of experience, which is a resource for learning for themselves and others.

3. Self-concept: Moves from a dependent personality toward a self-directing human being.

4. Readiness to learn: Becomes oriented toward adjustments in social roles. Various authors discuss this change in developmental tasks. Three broad age brackets are usually categorized, associating definite roles and tasks within each category. This categorization is based on the premise that society imposes on adults expected achievements at various intervals to complete such tasks in order to be declared

successful or "normal." The three categories are designated as Early Adulthood (18-30), Middle Age (31-65), and Later Adulthood (66 and over).

Ten social roles identified with those developmental tasks are *worker, mate, parent, homemaker, son or daughter of aging parents, citizen, friend, organization member, religious affiliate, and user of leisure time.* As adults set tasks for these roles, they sense impetus added to their readiness to learn.

In addition to these social roles, adjustment is a major part of any developmental task. This adjustment is seen as an active, gradual process, which continues throughout life and is helped as the adult acquires experience, accepts new ideas, conforms to a society's expectations, and strives toward self-realization. Adult life is prioritized around six core human values: (a) sense of self-achievement or work, (b) intimacy, (c) creativity and play, (d) search for meaning, (e) compassion, and (f) contribution. These core values are found and enacted within eight human systems of adult life: (a) personal, (b) couple, (c) family, (d) friendship, (e) work and career, (f) leisure, (g) social, and (h) environmental.

5. Time Perspective: Changes away from postponed application of learning toward immediate concern of learning goals. Learning now shifts from subject-centeredness to issue-, task-, problem-, or life-centeredness.

6. Motivation: Learning motivation *moves away from external incentives* such as better jobs, promotions, status, higher salary, fringe benefits, work conditions, good pay, paid insurance, and vacation and *moves toward internal incentives* such as desire for increases in job satisfaction, self-esteem, better quality of life, continued growth and development, greater self-confidence, recognition by peers, and self-actualization (SA). Following is an articulation of the 14 SA directions.

SA directions of taking initiative—as identified by Maslow (1970) and underscored by Goble (1971)—in andragogical, self-directed learning (SDL) lead to huge rewards for military ABE learners. Their growth would spill over into the lives of others with whom they are in contact. These 14 SA growth areas include the following: 1) wholeness, 2) perfection, 3) completion, 4) justice, 5) aliveness, 6) richness, 7) simplicity, 8) beauty, 9) goodness, 10) uniqueness, 11) effortlessness, 12) playfulness, 13) truth, honesty, reality, and 14) self-sufficiency.

Not only would older adults benefit, business organizations with which they are connected would reap a bountiful harvest. Additionally, organizations, communities, families, and groups of friends and relatives with whom they engage would gain much. Moreover, older adults would experience positive growth from developing these areas in their personal lives (Henschke, 2009).

Characteristics of Adult Learners (Henschke, 1989; Knowles, 1973)

They are goal-oriented. Adults are motivated by the immediate usefulness or relevance of material to be learned.

They are less flexible. Habits and methods of operating are developed into a routine. Adults must see more advantage in recommended change over what already exists *before* they will accept change.

They require longer time in performance of learning tasks. Slower reaction time occurs as adults age because of such physiological hindrances as decreased vision and hearing loss.

They are impatient in the pursuit of objectives. Adults are pragmatic and may become frustrated if they do not see instant gains.

They find little use for isolated facts. Adults want to move quickly from theoretical skill emphasis to application of skills in real-life problems, issues, or tasks.

They strive for recognition and success. Adults are more likely to succeed in an atmosphere of positive regard and reinforcement for successes.

They have multiple responsibilities, all of which draw upon their time. Adults are likely to be too tired and less alert in learning environments after working, caring for others, or attending to responsibilities all day.

They are experienced in the 'school of life'. Adults have often assumed roles their instructor has not. In applying learned information to their present circumstances, they often refer to a substantial body of prior experience unknown to the instructor.

They require a more constant and ideal learning environment. Adults over age 35 particularly respond well to stronger lighting and a quiet place to work free from distractions and sudden temperature changes.

They usually come to the program on a voluntary basis. Unlike children, adults usually are not required to attend classes. If adults do not see progress toward their goals, they often will drop out of a program.

Some Characteristics of ABE Learners and Their Instructional Implications (Knowles, 1973)

1. *Immediate Concerns*
    - Realistic problems
    - Adult oriented material
    - Concrete situations

2. *Low Self-Concept*

- Respect learners for what they respect in themselves
- Involve them in planning and decision-making for the curriculum
- Tap their experiences

3. *Different Value Systems*
    - Relate learning to life and direct plans of work to learners' coping skills
    - Encourage open discussions around value shifts from youth into aging
    - Make no moral judgments as to what is good or bad

4. *Use of Defense Mechanisms*
    - Allay excuses given by frustrated learners, without attacking them
    - Emphasize importance of goal-seeking and self-improvement (constructive behavior)
    - Accept any patterns of self-protection against perceived internal and external threats

5. *Sensitivity to Non-Verbal Communication*
    - Be alert for clues of what is said and what is not said but likely felt
    - In responding, guard against negative nonverbal responses through voice, gestures, or facial expressions

A Closer Look at ABE Characteristics (Henschke, 1989; Knowles, 1973)

The higher the degree of illiteracy in an adult, the more likely they are to attempt to hide their undereducation and exhibit an attitude of resignation because of repeated failures. Any attempt to make a learner with limited education believe, understand, act, and gain a skill will indeed impact their basic need for security. Through this understanding, the instructor/facilitator can develop techniques that will boost self-esteem and improve socialization skills.

Immediate Concerns: Learning goals must be defined in terms of immediate concerns. Learning tasks should be short and clearly defined toward immediate rewards and real-life situations.

Low Self-Concept: From their review of the research on the concept of the self, Puder and Hand (1968) indicate some pertinent points, such as:

- A person's self is the sum total of all that a person can call their own.
- Self, the nucleus of personality, includes a system of ideas, attitudes, values, and commitments in an inner world.
- There is a positive relationship between educational disability and immature self-concept.
- There is a positive and significant correlation with self-concept and perceived evaluations of significant others.

Edgar Borgatta and William Lambert (1968) reviewed extensive research on the Self. Two **general** assumptions underlie their studies in which a subject is made to feel they have failed or are personally inadequate, thus implying an effect on their self-concept:

- A person's level of self-regard is learned through a combination of rewards and punishments for one's actions and reactions to them.
- A person's level of self-regard is of great importance in predicting their behavior.

Thomas A. Harris (1969), in agreement with some theorists, notably "transactional analysts," provides a means whereby one may attempt to "find themself" in exploring their own behavior. Proponents of transactional analysis contend that three states exist in each person – child, parent, and adult – and that each person can classify themself as "OK" or "not OK" with respect to themself and others.

Because an adult entering a basic education program has a deep psychological need to become self-directing, they resist and resent being placed in situations in which they are told what to do or not to do, or they are talked down to, embarrassed, or criticized.

Different Value Systems

Adults sometimes have value systems widely differing value systems because of social and economic systemic issues. Curtis G. Larson (1971), in a review of research, suggested adult socialization, a product of experiences, is highly significant in acquisition of different kinds of values. Adults may have problems restructuring some of their values and learning some things; but, under supportive facilitation/instruction, are capable of doing so.

If teachers want to respect a person's life, they must respect the person's experience and right to help in examining it for values. In areas involving aspirations, purposes, attitudes, interests, beliefs, etc., we may raise questions; but, by definition and social right, we cannot dictate values. The development of values is a personal and lifelong process. We should be interested in improving the valuing process whereby learners are helped to find values. This process would include the following:

- *Choosing:* freely from alternatives after thoughtful consideration of the consequences of each;
- *Prizing*: cherishing, being happy with the choice; willing to affirm the choice publicly; and,
- *Acting:* doing something with the choice repeatedly, in some pattern of life.

Use of Defense Mechanisms

Feelings of frustration generate anxieties in adults with limited education who have tried to hide their deficiencies from others, including families or co-workers. In self-defense, they tend to distort reality through a variety of defense mechanisms. The character of originally learned reaction when the adult was threatened accounts for the variety of

defense mechanisms. Thus, if the adult's original reaction was to blame someone (one successfully got away with it), pathological lying might result.

Internal and external threats to achievement of their desired goals may engender evolution of a defensive rather than constructive behavior, which could manifest in ways such as:

Rationalization: Justifying conduct or opinions by inventing socially acceptable reasons. *Example*: Citing an "injury to writing hand" when asked to fill out a form or not having eyeglasses when asked to read.

Repression: Selectively "forgetting" unpleasant or undesirable situations. *Example*: Withdrawal from unfavorable aspects of class or program.

Projection: Attributing a poor quality or unethical motive to someone else or placing blame for difficulties on others. *Example*: "My father quit school, too; I guess I'm a chip off the old block." "My mother (as teacher) never could get it across to me."

Compensation: Expressing excellence in another field while displaying inadequacy on one. *Example:* "I never was good at readin' and writin'—only numbers."

Displaced Aggression: Transferring hostility from actual source of frustration to some innocent person or object. *Example:* "My job gets me so tired I don't have time to study like the others."

Sensitivity to Nonverbal Communication

Communication among families with limited education tends to be non-verbal, expressive, and explosive. They learn to "read each other" more by motions and gestures (i. e., slanted eyebrows, wrinkled forehead, smiles and frowns, grunts and groans). "Expressive" refers to emotionality as well as manner; "explosive" refers to the erratic, rather than intellectualized, socially appropriate type of response.

In the learning setting, learners often observe nonverbal cues their peers or facilitators/instructors present in facial expressions, body posture, and mannerisms. The facilitator/instructor, on the other hand, can tell a great deal about learners' interest level, attention span, and personality. At the same time, facilitators/instructors must be conscious of the possible affect their body language may have on learners.

Other ABE Learners' Characteristics and Techniques for Facilitating Learning (Knowles, 1973)

- *Alienation – Feeling of Helplessness over Control of Events*
    - Enhance learners' attitudes about their ability to learn
    - Orient learners to be active and seek out resources in their communities

    - Cite examples in which human potential, once awakened, changed someone's life drastically

- *Reticence and Lack of Self-Confidence*
    - Help learners experience success and security by giving small tasks before proceeding into more demanding activities
    - Present well-planned and meaningful lessons
    - Begin with familiar and concrete problems
    - Add humor to every session

- *Hostility and Anxiety Toward Authority*
    - Project yourself as a friend or guide with genuine honesty and warm regard for each person
    - Dress conservatively
    - Allow controversy in group discussions
    - Speak in conversational tone

- *Fear of School, Failure and Change*
    - Assure entire group choice of seating, responses, and homework are voluntary
    - Teach and facilitate good study habits
    - Encourage interaction
    - Set a warm, informal, relaxed atmosphere
    - Constantly reassure learners in their small successes

- *Limitations from Home Life*
    - Find ways to remedy physical and emotional wounds resulting from environmental limitations
    - Provide a quiet, comfortable place for study
    - Make available well-stocked supplementary aids
    - Naturally suggest and highlight use of library, agencies, and/or learning centers

- *Cultural Exclusion*
    - Provide links between learners and sources of pleasure, learning, and cultural enrichment open to them
    - Post schedules of community activities or review with learners weekly events listed in local media sources
    - Schedule field trips to lectures, libraries for films or demonstrations, or public proceedings
    - Invite a cooperative extension agent to give a demonstration relating to some need expressed in planning sessions

Although conceptualizations of 'maturing' or 'maturation' came into being in 1959 and was expanded upon in 1980 by Knowles, its vestiges remain in annals and current practices of andragogy and adult education into the present time—as of this writing in

(2022), 63 years after originally published. These dimensions of maturation relate not only to needs and goals of individual persons, but also needs and goals of institutions, societies, and nations around the world. Knowles' dimensions also apply to military personnel who, as they learned with the competent help of Dr. Andy Anderson, also matured in their ability to take responsibility for directing their own learning. In many cases, taking responsibility included various dimensions of maturity in the 15 identified by Knowles (list below).

Maturity may be defined as the goal of andragogical education if it is to serve as a guide to continuous learning. Knowles (1980, pp. 27-36) suggested if really critical dimensions of the maturing process could be identified, adult educators and learners [military and civilian] would have reliable yardsticks against which to measure accomplishment of their growth and maturity. Knowles also offered that dimensions mentioned describe 'directions of growth,' not absolute states to be achieved. The fifteen directions of growth are only a beginning list, not a complete list.

Dimensions of Maturation

	From		Toward
1.	Dependence	→	Autonomy
2.	Passivity	→	Activity
3.	Subjectivity	→	Objectivity
4.	Ignorance	→	Enlightenment
5.	Small Abilities	→	Large Abilities
6.	Few Responsibilities	→	Many Responsibilities
7.	Narrow Interests	→	Broad Interests
8.	Selfishness	→	Altruism
9.	Self-Rejection	→	Self-Acceptance
10.	Amorphous Self-identity	→	Integrated Self-identity
11.	Focus on Particulars	→	Focus on Principles
12.	Superficial Concerns	→	Deep Concerns
13.	Imitation	→	Originality
14.	Need for Certainty	→	Tolerance for Ambiguity
15.	Impulsiveness	→	Rationality

(Henschke, J. 2014, p. 373; Knowles, M.S. 1959, pp. 149-153).

Conclusion

As we move forward to the present day to honor the many years of Dr. Clinton Lee "Andy" Anderson's involvement with military education, we see andragogy still providing the basis for designing and implementing adult education programs in the Army. It is important to note here, throughout those years, there were those who questioned Knowles' Andragogical Adult Education theory/model. Through his strong advocacy for Knowles' model and successful programs built around this model Anderson proved andragogy to be the valid model for use in military education. Today, adult learners in the military are attending programs including Noncommissioned Officer courses, Captains' Career courses, Command and General Staff courses, and the U.S.

Army War College. Knowles' influence on. Anderson helped shape the present andragogical face of Army education in 2022. Remembering Knowles' passing in 1997 (25 years ago), we currently mourn the early 2022 passing of Dr. Clinton Lee "Andy" Anderson. KUDOS, HONORS, CHEERS, HEARTY CONGRATULATIONS, and ABUNDANT THANKS ANDY & MALCOLM!

References

Borgatta, E. F., & Lambert, W. W. (Eds.). (1968). *Handbook of personality theory and research*. Rand McNally.

Edwards, G., & Pierson, D. (2022). *Chronicles of a weary traveler: Life story of Clinton Lee (Andy) Anderson-2011* [Unpublished Document].

Goble, F.G. (1971). *The third force: The psychology of Abraham Maslow.* Pocket Books.

Harris, T. A. (1969). *I'm OK, you're OK: A practical guide to transactional analysis.* Harper & Row.

Henschke, J. A. (1989). *The adult learner.* [Conference presentation]. Literacy Conference: Becoming Part of the Solution, St. Louis, MO, United States.

Henschke, J. A. (2009). Movement toward staying ahead of the curve in developing and managing human capital. In V. Wang & K. King (Eds.), *Human performance model in the global context* (pp. 1–28). Information Age Publishing.

Henschke, J. A. (2014). A personal perspective and learning experience on living a long, healthy life. In V. X. Wang (Ed.), *Adult and community health education: Tools, trends and methodologies* (pp. 368-388). https://doi.org/10.4018/978-1-4666-6260-5.ch020

Knowles, M. S. (1959). Maturation as a guide to learning: A multi-dimensional approach to liberal education. In C. W. Merrifield (Ed.), *Leadership in voluntary enterprise* (pp. 149–153). Oceana Publications, Inc.

Knowles, M. S. (1980). *The modern practice of adult education: From pedagogy to andragogy* (Rev. ed.) Follett Publishing Company, Inc.

Knowles, M.S. (1973). *Basic education: Teaching the adult*. Maryland Center for Public Broadcasting.

Larson, C. G. (1971). *Behavioral objectives in the affective domain for industrial education teachers* [Unpublished doctoral dissertation]. Utah State University. Dissertation Abstracts Online Accession No: AAG7300944.

Maslow, A. H. (1970). *Motivation and personality* (2nd ed.). Harper and Row.

Puder, W. H., & Hand, S. E. (1968). Personality factors which may interfere with the learning of adult basic education students. *Adult Education Quarterly, 18*(2), 81–93. https://doi.org/10.1177/074171366801800202

DIGGING INTO AN INTERNATIONAL ADULT EDUCATION ANDRAGOGY EPISTEMOLOGICAL FOUNDATION: FOUR VARIATIONS OF CARING LOVE (DEALING BOUNTIFULLY)

John A. Henschke, Ed.D.[1]

ABSTRACT: This paper recaps Henschke's 2021 CIAE Pre-conference paper on the fact that the first 200 years of the epistemology and practice of adult education in the United States was almost exclusively sponsored by the Church. Even in ancient times from the Bible book of Ecclesiastes, third chapter, there are 14 sets of things [28 in number] that God set to occupy us in this life on earth; beside this He also placed 'eternity in our hearts.' Thus is identified an often-overlooked broad spectrum of adult education/ andragogical epistemology of religion, spirituality, and piety/devotion. My life has been mainly guided by what I declare as God's call(s) for me on earth and 'eternity in my heart' for the afterlife to come. This background will then be connected with this year's (2022) CIAE Pre-conference focus of the paper on a deeper probe into four major variations of caring and love exemplified and included in God's creation with elements, such as: Four sets of Greek, Hebrew words, and English explanations with supporting illustrations of caring and love; presented in the order mentioned above a. Eros, Yada, sublime intimate sexual love; b. Storge, Basar, the good news of 'I've got your back'; c. Philia, Rea, family relationships and common interests; and d. Agape, Ahav, God's eternal, divine love for humankind. All of this is set within this life on earth and in the afterlife (eternity) to come.

Keywords: andragogy, need-meeting, focused energy

From Henschke's 2021 Commission of International Adult Education (CIAE) paper comes a recap as an introduction and connection to this 2022 Henschke paper. The theme of the 2021 paper had to do with establishing a deep probe into the piety foundation of adult education within the first 200 years in the USA, from 1599 to 1799. The author of Ecclesiastes in the Bible sets within the context of the totality of life—the practical aspects of living which God has given to human beings that is good in His sight: wisdom, knowledge, and joy. God says, "For everything there is a season, for every purpose under heaven, there is a right time – [this is worded in 14 pairs for a total of 28 things]: birth and death, planting and uprooting, killing and healing, tearing down and building, weeping and laughing, mourning and dancing, throwing stones and gathering stones, embracing and refraining, searching and giving up, keeping and discarding, tearing and sewing, keeping silent and speaking, loving and hating, war and peace" (Eccl 3).

All this is part of the task God has given humanity to keep us occupied. He has made everything beautiful in its time. Nevertheless, over and beyond all of these practical daily matters, there is another dimension beyond time, and this is accomplished in such a way that human beings can't really, fully comprehend at this time, that God has set '*eternity in their hearts*' (Eccl 3:11; Richardson, 1977, 1984, back cover).

However, from beginning to end, all the things God does will last forever throughout eternity. In this life, the writers say, "Eye has not seen, nor ear heard, neither have entered into the heart of us human beings, the things which God has prepared for them who love Him. But God has revealed this treasure unto us by His Spirit: for the Spirit

[1] Emeritus professor of andragogy at Lindenwood University, St. Charles, MO. E-Mail: JHenschke1@lindenwood.edu; http://www.umsl.edu/~henschke/

searches all things, yes, the deep things of God" (Isa 64:4; 1 Cor 2:9-10). Nevertheless, the reality is "…this treasure we have in clay pots, so that the overwhelming power comes from God and not us. In this life: we have all kinds of trouble, but we are not crushed; we are perplexed, yet not in despair; persecuted, yet not abandoned; knocked down, yet not destroyed" (2 Cor 4:7-9).

"Nothing or no one will be able to separate us from God's powerful love in Messiah Yeshua: trouble, hardship, hunger, poverty, danger, war… No, in all these things we are super conquerors through Him who powerfully loved us—neither death nor life, neither angels, nor other heavenly powers, neither what exists nor what is coming; neither powers above nor powers below, nor any other created thing—will be able to separate us from God's love" (Rom 8:35, 37-39).

In eternity, God tells us, "I create new heavens and a new earth: and the former shall not be remembered or come into the heart…and I (God) will wipe away all tears from your eyes, and there shall be no more death, neither sorrow, nor crying, neither shall there be any more pain" (Isa 65:17; Rev 21:1-4). The Psalm declares, "I (God) will be present with you on the path of life where there is fullness of joy and pleasures forevermore" (Ps 16:11). According to scriptures, God accomplished this by His loving the world so much that he gave His only begotten son (Jesus Christ) to die on the Cross of Calvary to forgive us of all our sins, and He raised Jesus from the dead; if we believe on Him, He will provide us the gift of everlasting life now and eternally in heaven (John 3:16; Rom 10:9-10; Eph 1:19-20).

Moreover, scripture assures us "God will finally destroy all His and our enemies and the last enemy that shall be destroyed is *death*" (1 Cor 15:25-26). The element of "eternity in their hearts" (Richardson, 1977; 1984, title of book back cover) began to emerge in the New Testament era (CE) on Mars Hill in Athens, Greece, where accomplished philosophers gathered for discussions and here was reference to a vague, unknown 'god' whose name no one knew. Various ancient peoples had a book about that 'god,' but they had lost the book, somehow hoping someone would find it and return it to them.

Then some people with strange customs and scholars with strange theories thought they were discovering something about this and becoming clearer about the identity of this 'god.' Suddenly the 'book' mentioned above appeared in the hand of some visitor to their location. After reading the book's introduction, the 'God' that appeared had the name 'Yahweh.' His initial articulation to a person named Abraham was a promise [in the form of a covenant], "I will make you into a great nation; and I will bless those who bless you, and I will curse those who curse you – you will be a blessing." Yahweh completes the statement to Abraham, by saying, "…all peoples on earth will be blessed through you." Hmm—sounds something like a hint of "human flourishing" going on or at least implied that was included. This "blessing" of everyone, seemed to be the major purpose and theme of the book, which turns out to be (Gen 12:1-3).

With this background from my paper of the 2021 CIAE Pre-conference (Henschke, 2021), we move to the major theme of this year's [2022] Pre-conference, highlighting the

four dimensions of love – Eros and Yada sexual love, Storge and Basar 'I've got your back' support love, Philia and Rea family love, culminating in Agape and Ahav everlasting love, which encompasses the other three loves mentioned.

First

Greek	*English Explanation*	*Hebrew*
Eros	sublime, intimate sexual love; generating children; the romantic love most of us come to know	Yada

Eros (Greek) Love: Seeing the pattern of male and female, some have concluded that humanity was created in the image of God *(who created male and female genders/sexes in the first place—Gen 1:27)* and expresses this in relationship, particularly in a well-functioning community, both in marriage *(which consummates in sexual intercourse, resulting in a child or children being conceived and born)* and in wider society. Traditionally, the image has been seen as the capacities that resemble God, like characteristics of reason, morality, language, a capacity for relationships governed by love and commitment, and creativity in all forms of art. This image and dignity apply to both 'male and female' human beings (*English Standard Version Study Bible*, 2008, p. 51).

Yada (Hebrew) Love: Sublime. Intimate Sexual Love, Generating Children. To perceive, understand, acquire, know, discern, be acquainted with a woman (in a sexual way, i.e., sexual intercourse; his wife - when Adam knew Eve, his wife) and be known, make one's self-known, cause to know; to be familiar; to be aware of; to appear; to inform; to announce; to reveal oneself; to appoint; to order. This is one of the most important Hebrew roots in the Old Testament. It expresses a broad variety of meanings about various types of knowledge that are gained through the senses. 'Yada' describes God's knowledge of man (Gen 18:19; Deut 34:10; Ps 1:6; Ps 37:18; Isa 48:8; Jer 1:5). It describes a person's relationship to the true God (1 Sam 2:12; 3:7). Euphemistically 'yada' is used for coitus (Gen 4:1; Num 31:17, 35; Judg 11:39; 21:11; 1 Sam 1:19; 1 Kgs 1:4).

Jesus, who was never known to lie about anything, claimed among other things to be "the truth" (John 14:6) was quoted to have said "…but, from the beginning of creation, God made them male and female; for this reason, a man shall leave his father and mother and be joined to his wife as a husband, and the two shall become one flesh. So, they are no longer two, but one—bone of bone, flesh of flesh. Therefore, what God has joined together, let no one separate" (Matt 19:4-6).

God brought Carol, my wife [a female] and me [John, a male husband] together. We have been officially married since 6/28/58—now more than 64 years. We have sought to glorify God in our marriage amidst our pleasures, joys, and difficult times along the way. Thus, we are here today**.**

Second

Greek	*English Explanation*	*Hebrew*
Storge	This is an affectionate love we share with our blood families or deepest friends, our adult education faculty/learner relationships we [as helper & helpee] forge with the people we see successfully through their academics by giving/receiving good news; "*I've got your back"*	Basar

Table 1. *Doctoral Dissertations Completed Using Henschke's Modified Instructional Perspectives Inventory (MIPI) (n=35).*

Year	Author	Title
1995	Thomas, E.	An identification of the instructional perspectives of parent educators. [KSU] **'N'**
1997	Seward, S.	An identification of the instructional perspectives of Kansas parents as teacher educators [KSU] '**N**'
1997	Dawson, S.	Instructional perspectives of nurse educators [UMSL] **'C**''
2003	Drinkard, G.	Instructional perspectives of nurse educators in distance education [UMSL] '**C**'
2005	Stanton, C (*Modified instrument and first validation study)*	A construct validity assessment of the Instructional Perspectives Inventory (MIPI) [UMSL] '**C**'
2006	Stricker, A.	Learning leadership: An investigation of principals' attitudes toward teachers in creating the conditions conducive for learning in school-based staff development [UMSL] **'C**'
2007	Reinsch, E.	The relationship among lifelong learning, emotional intelligence and life satisfaction for adults 55 years of age or older [UMSL] '**C**'
2007	McManus, L.	The instructional perspectives of community college mathematics faculty [UMSL] '**C**'
2007	Rowbotham, M.	Teacher perspectives and the psychosocial climate of the classroom in a traditional BSN program [UMSL] '**M**'
2009	Ryan, L.	Adult learning satisfaction and instructional perspective in the foreign language classroom [UMSL] '**C**'
2010	Manjounes, C.	An adult accelerated degree program: Student and instructor perspectives and factors that affect retention [LU] **'N'**
2011	Vatcharasirisook, V (*Second validation study of instrument)*	Organizational learning and employee retention: A focused study examining the role of relationships between supervisors and subordinates [UMSL] **'M'**
2011	Jones-Clinton, T.	Principals as facilitators of professional development with teachers as adult learners [UMSL] '**C**'
2011	Moehl, P (*Third validation study of instrument)*	Exploring the relationship between Myers-Briggs Type and Instructional Perspectives among college faculty across academic disciplines [UMSL] '**M**'
2012	Risley, L.	Exploring Congruency between John A. Henschke's Practice and Scholarship [LU] **'N'**
2013	Lubin, M.	Coaching the Adult Learner: A Framework for Engaging the Principles and Processes of Andragogy for Best Practices in Coaching [VPSU-NCR] **'M'**
2014	Gillespie, L.	Trust in Leadership: Investigation of Andragogical Learning and Implications for Student Placement Outcomes [LU] '**C**'
2014	Lu, Y.	An Exploration of Merit Pay, Teacher and Student Satisfaction, and Teacher Performance Evaluation from an Instructional Perspective [UMSL] '**M**'
2014	Queen, V.	Practical Andragogy: Considering Instructional Perspectives of Hospitality Educators [SLU] **'N'**
2015	Lundry, S.	Transformational Learning: An Investigation of the Emotional Maturation Advancement in Learners Aged 50 and Older [UMSL] '**M**'
2016	Hantak, K.	An Initial Examination of Relationships between Early Intervention Services and Andragogical Factors [LU] '**N**'
2016	Davis, A.	Instructional Perspectives of Faculty Teaching Portfolio Courses with Adult Education Training and without Adult Education Training [CU] '**N**"
2016	McDaniel, L.	Andragogical Practices of School Principals in Developing the Leadership Capacities of Assistant Principals [MU] '**N**'
2017	Najjar, H.	A Case Study: An Andragogical Exploration of a Collegiate Swimming and Diving Coach's Principles and Practices at Lindenwood University. [LU] **'C**'
2017	Klepper, E.	Andragogy and Workplace Relationships: A Mixed Methods Study Exploring the Employees Perception of their Relationships with their Supervisors. [LU] '**C**'
2017	Morgan, R.	Inclusive Education for Preschool Learners with Autism: A Program Evaluation. [LU] '**M**'

Year	Author	Title
2018	Kheang, S.	Guidelines for USA Teacher Leadership in Adult Classrooms to Enhance International Undergraduate Satisfaction. [LU]. **'C'**
2018	Grant, P.	A Mixed-Methods Study on Faculty Caring and Trust as Perceived by Undergraduate Students in Classrooms at a Mid-Western University [LU].'**C**'
2019	Hamra T.	A mixed methods study comparing nursing preceptored clinical learning experiences (NPCLE) and nursing simulation clinical learning experiences (NSCLE) of nursing students in a mid-west community college [LU] **'C**'
2019	Anderson T.	Andragogy and lean six sigma in today's business environment [LU] '**C**'
2019	Shostak G.	The intersection of Andragogy and Courtroom Practice [LU] **'M**'
2019	Curran, D.	A Qualitative Investigation of the Andragogical Teaching Methods Used in Adult Group Piano/Organ Instruction [LU] '**N**'
2020	Bush, B.	Exploring how Andragogical Principles may Enhance Doctoral Students Persistence to Dissertation Completion [LU] '**C'**
2021	Umm-e Habiba	Perception and Practices of Teachers and Students about Andragogical Approach: A Case of Teacher Educations in Punjab [UPP] '**N**'
2021	Mujahid, A.	Exploration of Teachers' and Students' Satisfaction. Teaching Quality and Teachers' Performance Evaluation from Instructional Perspective at University Level [UOELP] '**N**'

Note: MIPI validated three times for reliability through – Cronbach Alpha. TRUST – strongest of seven factors throughout.

Key to Table Abbreviations and Acronyms

1. Involvement on dissertation committees: 'C' = Chair; 'M' = Member; 'N' = Not on Committee.
2. University acronyms and names: Kansas State University (KSU) [2]; University of Missouri-St. Louis (UMSL) [13]; Lindenwood University (LU) [14]; St. Louis University (SLU) [1]; Virginia Polytechnic State University-National Capital Region (VPSU-NCR) [1]; Capella University (CU) [1]; Mercer University – Atlanta, Georgia Campus (MU) [1]; University of Punjab, Pakistan (UPP) [1]; University of Education. Lahore, Pakistan (UOELP) [1].

Table 1 shows 35 doctoral students who used *Henschke's Modified Instructional Perspectives Inventory (MIPI)* – validated for reliability three times in dissertations at nine different universities. I worked with each of them to adapt the MIPI wording and make it appropriate to the purpose of their doctoral research while maintaining the integrity of the MIPI. However, I was on only 24 committees, either as chair or committee member. The other 11 dissertation committees were housed at universities where I had no adjunct or regular affiliation. In each case, the dissertation was successfully completed and defended with the doctoral degree's being awarded to the candidate from the appropriate university. In addition, from 1983 to 2021, I chaired 61 doctoral dissertations to completion and was a member of 55 other dissertation committees at five different universities. Space limitation in this paper does not permit the listing of each dissertation title, author and university name**.**

Although dissertations with which I was affiliated could be listed under the categories of Storge / Basar *["I've got your back"],* or Philia / Rea *[warm friendship or common interests]*, I chose to list the strongest connection as *"I've got your back"*—indicating a faculty member requiring a student to do quality research work and supporting the student in such a way to make certain the student candidate successfully completed and defended the dissertation. Storge, basar love was present between me and my students mentioned in Table 1, which helped them complete their research and learning tasks.

Since we humans were created by God to have part of our purpose to be learning as learners and facilitators, we have "I've got your back" supportive love relationships between faculty and student as indicated just above for academic accomplishments at universities. One of my favorite Bible passages could be paraphrased thus: "*I have a*

second great joy, and that is to know that my students and graduates walk in truth" (3 John:4).

Reciprocity of Empathy, Trust, and Sensitivity

To be effective, a leader must combine the reciprocity of empathy, trust, and sensitivity in concert with the ability and potential of learners for the same, to understand the learning/training process and interact with leaders effectively in making the right choices. This reciprocity takes the form of the leader's initiating and maintaining the combination of three elements: empathy, trust, and sensitivity. Insensitivity may get in the way and block the process of modeling reciprocity of the three. These three elements are part of the seven factors in *Henschke's MIPI* used in the 35 dissertations enumerated in Table 1.

Empathy—The leader:

- Feels fully prepared to teach;
- Notices and acknowledges to learners their positive changes;
- Balances personal efforts between learner content, acquisition and motivation;
- Expresses appreciation to learners who actively participate; and,
- Promotes positive self-esteem in learners.

Trust—The leader:

- Purposefully communicates to learners they are each uniquely important;
- Believes learners know what their goals, dreams, and realities are like;
- Expresses confidence that learners will develop skills they need;
- Prizes the learners to learn what is needed;
- Feels learners need to beware of and communicate thoughts and feelings;
- Enables learners to evaluate their learning progress;
- Hears learners indicate their learning needs;
- Engages learners in clarifying their aspirations;
- Develops a supportive relationship with learners;
- Experiences unconditional positive regard for learners; and,
- Respects the dignity and integrity of learners.

Insensitivity—The insensitive leader (without reciprocity, leans toward insensitivity):

- Has difficulty understanding learner's point of view;
- Has difficulty clearly expressing thoughts to learners;
- Feels impatient with learner's progress;
- Experiences frustration with learner's apathy;
- Has difficulty with amount of time learners need to grasp various concepts;
- Gets bored with learners' many questions;
- Feels irritation at learner inattentiveness in the learning setting.

Sensitivity—The sensitive leader (with reciprocity, leans much more toward sensitivity):

- Makes certain to understand learner's point of view;
- Takes pains and time to clearly express thoughts to learners;

- Exercises patience in helping all learners progress;
- Overcomes any frustration with learner apathy;
- Uses all time learners need to grasp various concepts;
- Thoroughly allows learners to ask all questions they need addressed; and,
- Resists any irritation at learner inattentiveness in the learning setting.

A research study conducted in Thailand with over 534 workers from banks, hotels, and hospitals found the higher participants scored on the combination of empathy and trust elements, the more they were satisfied with their jobs (Vatcharasirisook, 2011). In turn, the higher they scored on job satisfaction, the more participants desired to stay with the company where they worked. In contrast, the higher participants scored on insensitivity, the more they wished to leave the company. The study found when the 23 total items of empathy, trust, and sensitivity worked together in reciprocity, the higher participants' overall satisfaction and productivity in their companies. The 23 items appeared to work in concert with each other within the storge and basar kind of love, thus forming an atmosphere of strong support and *'I've got your back'* comradeship.

In another research study, a comparison between the 11 items in trust from the MIPI and 11 items from a CPS were found compatible (Grant, 2018). In this study, trust and caring appeared to be items representing the storge and basar kind of love, thus also forming an atmosphere of strong support and *'I've got your back'* comradeship.

Table 2. *Comparison of MIPI-s 11 Items of Trust Factor and 11 Items of Caring from CPS (Grant, 2018)*

MIPI-s (Modified Instructional Perspectives Inventory)	**CPS (Caring Profile Scale)**
7.) Purposefully communicate to learners that each learner is uniquely important?	2.) Comforting?
8.) Express confidence that learners will develop the skills they need?	3.) Positive?
16.) Appear to trust learners to know what their own goals, dreams, and realities are like?	8.) Understanding?
28.) Appear to prize the learner's ability to learn what is needed?	9.) Personal?
29.) Appear to feel that learners need to be aware of and communicate their thoughts and feelings?	10.) Caring?
30.) Enable learners to evaluate their own progress in learning?	11.) Supportive?
31.) Hear what learners indicate their learning needs are?	12.) An attentive listener?
39.) Engage learners in clarifying their own aspirations?	13.) Centered on you?
43.) Develop supportive relationships with learners?	15.) Aware of your feelings?

44.) Appear to experience unconditional positive regard for learners?	16.) Visibly touched by your experience?
45.) Respect the dignity and integrity of the learners?	18.) Respectful of you?

Caring love also sweeps a broad-brush stroke over all the four categories listed above – Philia / Rea, *[brotherly, sisterly, family];* Storge / Basar, *[blood families];* Eros / Yada, *[sexual love producing children];* and Agape / Ahav, *[God's charity, everlasting, eternity in their hearts love]* - Philia / Rea, *[brotherly, sisterly, family*] is the primary category chosen for the family love category. Philia / Rea, *[brotherly, sisterly, family*] is the main caring love I chose for my family. As a professor, my work is focused on the kind of love for learners defined as Storge – Greek, and Basar – Hebrew, which is expressed as *"I've got your back"* communication.

Third

Greek	*English Explanation*	*Hebrew*
Philia	a brotherly or sisterly love we share in close family relationship, warm friendship, common interests we connect with others in social groups	Rea

My wife and I have been married 64 years. In the last couple of years (2020 to 2022), our wonderful daughters purchased us each a one year auto-biographical book development subscription for us to write 52 chapters [one chapter each week] addressing questions on various episodes of our life histories. Our daughters chose the questions to be answered. Each of my wife's and my chapters sought to reflect the glory of God guiding each of our lives. This will help our future generations know us in how we sought to follow the Lord Jesus Christ. We wish we had known about this process in earlier years, so we could have had our parents address some of the same questions and share with us about their lives; but, we didn't. Notwithstanding that missed opportunity, we pray this process will be a help and blessing to generations to come. Further, we hope they will pass on this idea for subsequent generations and encourage them to do the same.

My wife's and my books are coming off the press at this writing. We will each receive a free copy of our book, and we have arranged to gift copies to our progeny now and in the future. We hope they will be surprised and excited to read them.

One of my favorite Bible passages related to family is "I have no greater joy than to know that my children walk in truth" (3 John:4). To that I add "… that my grandchildren and great-grandchildren and future generations of great-grandchildren walk in truth." This kind of love will go on and on in Henschke descendants for generations to come. My prayer is that the benefits of this will accrue with each generation and for the eternity which God has placed in our and their hearts. We love them all very dearly.

Fourth

Greek	*English Explanation*	*Hebrew*
Agape	God's unconditional, divine love, loving kindness toward mankind which is everlasting, perfect, selfless, sacrificial and encompasses all other love. Jeremiah 31:3 "He has loved us with an [ahav] everlasting love."	Ahav

Table 3. *Extract from 1 Cor 13, Known as the 'Agape Love' Chapter in the Bible.*

Agape Love Is	Agape Love Is Not
1. Endures long;	1. Envious;
2. Is patient;	2. Boiling over with jealousy;
3. Is kind;	3. Boastful;
4. Rejoices when right prevails;	4. Vainglorious;
5. Rejoices when truth prevails;	5. Displaying itself haughtily
6. Bears up under anything that comes;	6. Conceited;
7. Bears up under everything that comes;	7. Arrogant;
8. Is ever ready to believe the best of everyone;	8. Inflated with pride;
9. Hopes are fadeless under all circumstances;	9. Rude;
10. Endures everything without weakening;	10. Unmannerly;
11. Never fades out;	11. Acting unbecomingly;
12. Never fails;	12. Insisting on its own rights;
13. Never becomes obsolete;	13. Insisting on its own way;
14. Never comes to an end.	14. Self-seeking;
15. Always trusts.	15. Touchy;
	16. Fretful;
	17. Resentful;
	18. Taking account of the evil done to it;
	19. Paying attention to suffered wrong;
	20. Rejoicing at injustice;
	21. Rejoicing at unrighteous.

Agape Love

This word is not found in classical Greek. The word is only found in revealed religion. It is translated 'charity,' meaning benevolent love. Its benevolence is not shown by doing what the person loved desires, but what the one who loves desires as needed by the one loved. God Gave—"For God so loved the world that He gave His only begotten Son, that whosoever believed in Him should not perish but have everlasting life" (John 3:16). Only God has such unselfish love**.**

The song *The Unclouded Day* (Atwood, 1985) takes me years back and very vividly speaks of this idea of "eternity in our hearts." The memory relates back to 1964 (58 years

ago) during the time I was minister of First Baptist Church, Jacksonville, Illinois. Mount Emory Baptist Church was located just a short distance on the same street from where my family and I lived in our church parsonage. Mount Emory was engaged in a building improvement program at the time. Their fundraising process included a number of meetings encouraging members to pledge and contribute to the building fund. Mount Emory honored me by asking if I would help by attending a congregational meeting and speaking about their building program, then singing *The Unclouded Day* while people walked to the front of the sanctuary and presented their pledges and contributions to the fund by placing them in offering plates. The lyrics of this beautiful foundational song are as follows:

1. O they tell me of a home far beyond the skies,
   O they tell me of a home far away;
   O they tell me of a home where no storm-clouds rise,
   O they tell me of an unclouded day.

   Refrain: O the land of cloudless day, O the land of an unclouded day;
   O they tell me of a home where no storm-clouds rise,
   O they tell me of an unclouded day.

2. O they tell me of a home where my friends have gone.
   O they tell me of that land far away;
   Where the tree of life in eternal bloom,
   Sheds its fragrance through the unclouded day.

   Refrain: O the land of cloudless day, O the land of an unclouded day;
   Where the tree of life in eternal bloom,
   Sheds its fragrance through the unclouded day.

3. O they tell me of a King in His beauty there,
   And they tell me that mine eyes shall behold;
   Where He sits on His throne that is whiter than snow,
   In the city that is made of gold.

   Refrain: O the land of cloudless day, O the land of an unclouded day;
   Where He sits on His throne that is whiter than snow,
   In the city that is made of gold.

4. O they tell me that He smiles on His children there,
   And His smile drives their sorrows all away;
   And they tell me that no tears ever come again,
   In that lovely land of unclouded day.

   Refrain: O the land of cloudless day, O the land of an unclouded day;
   And they tell me that no tears ever come again,
   In that lovely land of unclouded day.

(Atwood, 1985).

The Unclouded Day exemplifies when "eternity in their hearts" will come to full bloom; in the world to come—heaven.

In 1996, when I received the coveted Everett M. Hosman Founder's Award from the Missouri Valley Adult Education Association (MVAEA), I was humbled and honored beyond words. When I returned to St. Louis the next week to teach my adult education classes at the University of Missouri-St. Louis, word of the award had reached my students. They congratulated me and asked how I felt about it. They asked if this was the top award I would ever hope to receive. I responded by saying at the time there was only one other award I would treasure more. After I paused for a moment, I said, "I can think of only one award I would treasure more than this one. When I come to the end of my life on earth, I desire to be awarded by hearing six words: 'Well done, good and faithful servant' from God and my Lord and Savior, Jesus Christ of Nazareth."

Since I received the MVAEA Founder's Award in 1996, I have been honored to receive 28 other adult education awards—local, state, regional, national, and international. Each award was exciting as well as humbling and honoring by representing my different professional andragogy/adult education accomplishments. Thus, I fulfilled numerous aspects of God's call upon my life. Of course, all the glory of these goes to God, who gave me the strength and wisdom to bring any of it to pass. Nonetheless, as I write this, still desires to and will treasure above all other awards he has received, hearing his Lord say to him at the end of his earthly life, the six words, "Well done, good and faithful servant."

Conclusion

This paper outlines four aspects of caring and love as a foundation of epistemology for adult education in the United States. Adult educators should take note of this aspect of adult education, including the perspective of andragogy. Following is a list of some items related to and illustrating caring and love within the paper, now enacted on earth, but also in the eternal after life—heaven: support for each other; helping each person in the group as they deal with and struggle with life problems; families cementing their relationship around common goals; faculty committing and following through with doctoral students finishing their academic programs with flying colors; helping others overcome what seems like insurmountable odds while prevailing, getting the victory, and succeeding; mutually 'having each other's back'; strengthening, preserving, being firm, encouraging, being helpful, seizing the moment, holding fast, constructing/building an infrastructure for accomplishing much; supporting a spouse in the midst of what could have been a complete collapse. This was undergirded with illustrating God, in whom we live, move and have our being, who loved us with an everlasting love, as follows: patient, kind, keeps no record of wrong, does not fail or gloat over our sins [wrong-doing], is not jealous, boastful, proud, selfish, rude, easily angered; but, takes delight in the truth; always bears up, trusts, hopes, endures; filled with lovingkindness and tender mercy that

never end. All of this culminates in God's glory on earth and in heaven, as He has set "eternity in our hearts."

References

The Bible [King James Version] – Hebrew and Christian Scriptures. Genesis 12:1-3 (2000 Circa BCE); Matthew 5:3-12 (Circa 55 CE).

Atwood, J. K. (1985). "The Unclouded Day": Hymn #606. In *Baptist Standard Hymnal with Responsive Readings*. Sunday School Publishing Board, National Baptist Convention, U.S.A., Inc.

Grant, P. (2018). *A mixed-methods study on faculty caring and trust as perceived by undergraduate students in classrooms at a Mid-Western University.* [Doctoral dissertation, Lindenwood University].

Henschke, J.A. (2021). Probing more deeply a major historical foundation of adult education internationally and in the United States of America. *Proceedings of the Commission on International Adult Education Pre-Conference.* Destin. FL: 2021 American Association for Adult and Continuing Education. October 4-5, 2021.

Richardson, D. (1984). *Eternity in their hearts* (Rev. ed.). Regal Books.

Vatcharasirisook, V. (2011). *Organizational learning and employee retention: A focused study examining the role of relationships between supervisors and subordinates*. [Doctoral dissertation, University of Missouri].

CHINESE AND AMERICAN CLASSROOM INSTRUCTION: CONFUCIAN AND CONSTRUCTIVIST PERSPECTIVE

Shuaipu Jiang[1]

ABSTRACT: Classroom instruction in China and in the United States have sharp differences. Typically, constructivist learning theory shapes American classroom instruction whereas Confucian educational culture shapes Chinese classroom instruction. Furthermore, typically, Chinese classrooms adopt a direct instructional approach whereas American classrooms adopt an indirect instructional approach. Awareness of such differences in classroom instruction informs educators of the educational backgrounds of students coming from different educational environments and cultures, enabling educators to better serve different student populations. Additionally, it is worth noting that educational culture worldwide is converging as indicated by world culture theory. This paper presents different classroom instruction in China and the U.S., and inspires educators to learn from the differences, reflect on their own instruction, and eventually innovate and improve their instruction.

Keywords: Confucian perspectives, constructivism, classroom instruction, China

When it comes to American classroom instruction and Chinese classroom instruction, there are a lot of differences. Typically, constructivist learning theory is the framework that shapes American classroom instruction whereas Confucian educational culture is the framework for traditional Chinese classroom instruction. Yet, China has conducted some educational reforms in teaching and instruction recently in certain regions and certain levels of education, which makes contemporary teaching in China a complex phenomenon. Deeply rooted in ancient Chinese educational philosophies and Confucian-heritage-culture, even Chinese contemporary education has incorporated some elements of western teaching to a certain degree; however, the dominant educational system and instruction still vary sharply from typical western education and instruction. In this paper, constructivist learning theory and Confucian educational culture will be presented, direct instructional approaches and indirect instructional approaches will be discussed, educational reforms in China will be displayed, world culture theory will be mentioned, and conclusions and reflections will be included.

Constructivist Learning Theory

It is well-known that the constructivist learning theory makes up the guiding framework in teaching and learning in the United States where classrooms provide a platform for learners to construct meanings as active and participatory learners (Ma & Luke, 2014). On the contrary, traditional Chinese education is established in an environment where teacher guidance and authoritative content are prevalent and mainstream (Ma & Luke, 2014). Therefore, students from the United States are normally accustomed to participatory dialogues in classrooms whereas students in China may not be familiar with classroom discussions and oral presentations (Ma, 2008, as cited in Ma & Luke, 2014).

"The social constructivist theory depicts knowledge as socially situated and collectively constructed" (Windschitl, 2002, as cited in Ma & Luke, 2014, p. 66). In school settings, all teaching and learning should revolve around learners and provide learners with hands-

[1] University of Tennessee, sjiang18@vols.utk.edu

on activities to enable them to actively construct knowledge and meaning on their own rather than passively receive transmitted knowledge from teachers (Ma & Luke, 2014).

However, recent years have brought about educational reforms and changes in China. "Constructivist learning theory becomes the main theoretical basis for reform and innovation education" (Liu et al., 2020, p. 543). For instance, the integration of network technology and English language teaching in China embraces the constructivist learning theory. Constructivist learning theory advocates creating a student-centered learning environment that includes four key elements, which are situation, collaboration, conversation, and meaning construction (Liu et al., 2020). Nowadays, multimedia and the Internet provide us abundant learning materials that are similar but more interesting than traditional paper versions of textbooks and such online resources situate learners with rich background knowledge. The relationships among students have changed from competition to collaboration under the constructivist learning theory via conversation among learners and between teacher and learners. And learners explore to construct their own meanings to achieve their learning goals.

Ancient Chinese Education Philosophies

Ancient Chinese education philosophies are summarized as: "emphasizing the cumulative process of learning and the importance of basic knowledge, emphasizing the integration of learning and practices, highlighting "practice makes perfect", and stressing heuristic instruction" (Shao et al., 2012, p. 56).

Such educational philosophies are rooted in Confucianism, which influenced traditional Chinese teaching considerably. The Chinese ancient teaching heavily relies on recitation and memorization following the sequence of "lecturing, listening, memorizing, and practicing" (Lei, 2005, as cited in Shao et al., 2012, p. 73). The ancient Chinese teaching process starts with the teacher reading and explaining; then, students repeatedly reviewing and reciting; and then, students asking and checking answers in teacher lectures and textbooks (Shao et al., 2012).

Confucian-Heritage-Culture

Students from mainland China grow up in a culture influenced hugely by Confucian ideals, which values harmony, collectivism, education, "filial piety", and family traditions and authority (Bodycott & Lai, 2012; Sun, 2013, as cited in Sun et al., 2019). Filial piety basically requires people to obey and respect parents and take care of them when they are old (Bodycott & Lai, 2012). Generally, Chinese parenting styles are more controlling and authoritarian than western parenting styles which are more tolerant and less demanding (Thakkar, 2011). Confucian-heritage-culture values diligence, self-efforts, willpower, hard work, and doing one's best on learning and lifelong practice (Sun et al., 2019). Confucius emphasized personal efforts and hard work instead of innate ability in terms of learning success (Thakkar, 2011). China's educators are regarded as respected authorities and teaching in China is characterized as apprenticeship, transmission, teacher-centered, text-limited, highly-structured, exam-oriented, and didactic (Holmes, 2005; Sun, 2013, as cited in Sun et al., 2019).

Traditional Classrooms Influenced by Confucianism

Influenced by Confucian educational culture, traditional Chinese classrooms normally have big class sizes, and have transmission of information as the single instructional method (Yi et al., 2021). In other words, there are few teacher-student interactions in traditional Chinese classrooms and the teacher is not able to take care of each student, make correct judgements on student learning, or provide timely feedback to students. Thus, students' learning creativity is difficult to accomplish (Yi et al., 2021). Teachers teach, disabuse, and propagate ideology and so-called legitimate knowledge (Shao et al., 2012). They are knowledge authorities and sages (Shao et al., 2012). "On Teachers" by Han Yu (802 A.D.) summarized three roles of a teacher: "to spread truth, to impart knowledge, and to untangle students' puzzlement and confusion" (Ma & Luke, 2014, p. 66). "Reciprocally, the student's roles are also threefold: to be exposed to truth, to learn knowledge, and to solve their puzzlement and confusion" (Ma, 2008, as cited in Ma & Luke, 2014, p. 66). As a response to the imposed roles, teachers in Confucian culture are expected to be the content experts who prepare the content comprehensively before the class, lecture the content systematically during the class, and answer students' questions and misunderstandings after the class (Ma & Luke, 2014). In a similar vein, students are expected to preview the text before the class, to attentively listen to the lecture but normally without interrupting or questioning the teacher during the class, and to ask questions after the class (Ma & Luke, 2014). Typically, a traditional Chinese class is characterized as a lecture according to predictable and pre-determined contents, processes, examples, exercises, and homework, with occasional, if not zero questionings (Shao et al., 2012). Students mentally engage the content internally but do not externalize the content in many expressive forms such as hands-on projects or in-class discussions or debates (Ma & Luke, 2014). Class sizes in K-12 education are typically 50-80 students per class whereas in college level are typically 40-200 students per class. Counterintuitively, some students from Confucian-heritage-culture, who were trained in environments that are large class-sized, teacher-centered, lecture-based, exam-oriented, and memorization-stressed, turn out to be able to outperform their U.S. counterparts who come from a learner-centered and constructivist learning background (Watkins & Biggs, 1996, as cited in Ma & Luke, 2014).

Direct Instructional Approach

The traditional Chinese model of teaching embraces the direct instructional approach, which builds on the idea that a highly structured presentation of knowledge enables the maximum learning for students (Ma & Luke, 2014; Shao et al., 2012). Specifically, first, the teacher presents a concept; second, the teacher shows the examples or illustrations to examine if the concept stands; and third, the teacher directs students to practice the concept until concept mastery is reached, during which students receive feedback from the teacher, apply the concept, and find examples of the concept (Ma & Luke, 2014).

Deeply rooted in Confucian culture, traditional Chinese teaching adopts a knowledge transmission method and views students as empty vessels waiting to be filled by information transmitted by the teacher (Ma & Luke, 2014). The teacher is considered as a content expert and authority figure that students normally do not question or challenge

(Ma & Luke, 2014). Chinese teachers have three expected roles: a role model to conduct socially preferred behaviors for their students, the role of parents or mentors, and the role of a teacher to ensure the desired progression of every student (Hu, 2002, as cited in Ma & Luke, 2014). All these roles put the teacher in the directive seat in deciding what to teach and how to teach. Thus, they maintain complete control over the class at all times to guarantee the smooth transmission of planned content (Tang & Absalom, 1998, as cited in Ma & Luke, 2014). The transmission of knowledge in the traditional Chinese direct instructional approach relies on imitation and repetition to help students achieve mastery of content (Tang & Absalom, 1998, as cited in Ma & Luke, 2014). The instruction is highly regulated and structured, strictly following the national curriculum for each grade level (Ma & Luke, 2014).

The method of transmission of knowledge aligns with the Chinese value of the importance of the solid and comprehensive foundational knowledge that students establish and accumulate a knowledge base before they apply or create (Ma & Luke, 2014). Thus, the focus of learning is not on how knowledge is constructed or created but on how the authoritative knowledge is transmitted to and internalized by students in the most effective and efficient way (Ma & Luke, 2014).

Indirect Instructional Approach

Strikingly different from the direct instructional approach is the indirect instructional approach that builds on a constructivist framework, which believes that knowledge is constructed by the learner rather than transmitted to the learner (Ma & Luke, 2014). The indirect instructional approach cultivates learners in becoming self-learners (Ma & Luke, 2014). Instructors use cases to help students infer a general principle or a concept and learners search for patterns, come up with questions, or make generalizations. The role of the instructor is not the authoritative figure as in the direct instructional approach; instead, the instructor serves as the facilitator who provides a context for students to make generalizations appropriately. Three features characterize indirect instructional approaches. First, it is students' own responsibility to learn instead of teachers; second, learning occurs when new information is connected to previous knowing and believing; and third, active learning achieved via discussions and collaborative learning in groups are ways for students to solve problems (Prince & Felder, 2006, as cited in Ma & Luke, 2014). However, an indirect instructional approach sometimes invokes interpersonal conflicts in teamwork and sometimes more resistance from students than a direct instructional approach (Ma & Luke, 2014).

Reforms of Classrooms in China

Traditional instruction caused some problems in China. For instance, traditional English as a Foreign Language (EFL) classes in China have such problems as strict teacher-student relationships which lead to less in-class discussions (Lu, 2014, as cited in Zhou, 2020) and lack of opportunities to cultivate critical thinking (Zhang et al., 2015, as cited in Zhou, 2020). Specifically, the instructional design and procedure in a traditional Chinese EFL class starts with the teacher previewing the topic in the textbook; then explaining the new words, sentences, and grammar; requesting students do exercises individually or in groups; evaluating students' performance; and finally providing

feedback and comments (Liu et al., 2020). In response to such problems, China has conducted educational reforms in recent years. The College English Curriculum Requirements in 2007 released by the Ministry of Education (MOE) of China proposed new blended teaching models that are both computer-based and classroom-based (MOE, 2007, as cited in Zhou, 2020). Information and Communication Technology (ICT) helped remold the traditional teacher-centered learning model through a new pedagogy called the "flipped classroom," which is an ICT-supported hybrid learning model that reverses the traditional in-class and out-of-class components of learning (Jenkins et al., 2017, as cited in Zhou, 2020). The "flipped classroom" pedagogy adopts the teaching methods that are task-based, case-based, inquiry-based, and project-based (MOE, 2015, as cited in Zhou, 2020). Specifically, three stages complete the flipped classroom teaching model, which are lecture videos as the core for previewing before class; task-driven and inquiry-based interactions in class; and diversified comments and reflections after class (Xie & Xu, 2015, as cited in Zhou, 2020). There are many positive effects of flipped classrooms. For instance, it offers out-of-classroom assignments that are more engaging and less awkward (Qiang et al., 2015, as cited in Zhou, 2020). It also broadens the borders of a classroom (Chen & He, 2015, as cited in Zhou, 2020). It enables students to explore different forms of assignments, such as recording an oral response to a video, collaboratively writing an essay online, and cooperating with group members to create a video (Zhang et al., 2015, as cited in Zhou, 2020). However, such a flipped classroom is not without problems; some students complain that they have insufficient out-of-classroom time, lack technology skills, and lack the access to online resources (Webb & Doman, 2016, as cited in Zhou, 2020). It is worth noting that students especially point out that they feel unaccustomed to learner-centered instruction (Yu, 2015, as cited in Zhou, 2020). Similarly, instructors also complain of some challenges they face when practicing a flipped classroom, such as instructional design problems, technology problems, and ICT implementation (Zhang, 2017, as cited in Zhou, 2020). Another reform happened in college English classrooms in one university in China. The instruction changed from the traditional teacher-spoon-feed-student instruction to student-self-instruction to cultivate autonomous learners (Wang, 2012).

More reforms have been made in college English classrooms in China. To address the criticism that English-major education in China is deficient in cultivating real-life use of English language, critical thinking, and problem-solving, instructors in Chinese college English classes became change agents. They tried different classroom instruction from the traditional one that students experienced in high schools, which is teacher-governed instruction (Ruan & Toom, 2020). For instance, one instructor who received education in the UK adopted student-centered instruction. The students initially resisted and were unadjusted to this new style of instruction as they were accustomed to teacher-centered instruction. However, after the initial resistance and adjustment, this instructor later effectively facilitated the transformation of students into active participants in classes (Ruan & Toom, 2020). Another instructor used innovative instruction to adapt a famous Korean TV show, *Running Man*, as a classroom activity in English academic writing class and achieved success in developing students' problem solving and analyzing skills and collaborative learning (Ruan & Toom, 2020).

Some medical universities in China implemented English-medium instruction (EMI) (Jiang et al., 2019). The instructor uses English in the visual demonstration, oral presentation, and class interactions with the objective of cultivating students' academic English communication and content knowledge and expertise (Jiang et al., 2019). The form of instruction is still a traditional Chinese style that starts from teacher lecture and occasional questioning and interactions (Jiang et al., 2019). And interactions are rarely between teacher and a single individual student, and even with one student, it will often lead to teacher and whole class interaction (Jiang et al., 2019). However, the double objectives of English and content knowledge learning of such EMI models have never fully been realized in real practice. The instructors are incompetent in English teaching and students rely on PowerPoint slides reading more than listening to comprehend the content (Jiang et al., 2019).

World Culture Theory

Despite cultural differences in America and China, it is worth noting the world culture theory that indicates a cultural convergence because of globalization in the current age in which we live. Specifically, world culture theory is a grand sociological theory that states that with globalization, modern states are becoming more and more convergent and similar (Anderson-Levitt, 2003: Frkovich, 2015). This does not necessarily translate into all educational systems and schooling in different countries being reformed and unified to be lasting and permanent systems; yet it does suggest that educational systems in China and the United States may be becoming more alike (Anderson-Levitt, 2003; Frkovich, 2015).

Conclusion

In summary, classroom instruction in China and in the U.S. have a lot of differences ranging from frameworks that guide instruction to instructional approaches in classrooms. Educational reforms in China have made classroom instruction in China nowadays a complex issue to study. As educators, it is valuable for us to be aware of these instructional differences to be able to serve different student populations; to see what is different from our own styles; to further reflect on our own styles; and finally, to improve and innovate our classroom instruction. It is due to this exposure to differences that we can start to see what we did not see before. To put it in a metaphor, fish only realize that they are in the water until they see the land. Learning our differences enables us to learn the familiar better. That is the meaning of this paper.

References

Achirri, K. (2021). "Life is splendid here in the U.S.": Intercultural learning in contemporary Chinese students' academic adjustment. *Qualitative Report, 26*(4). https://doi.org/10.46743/2160-3715/2021.3501

Anderson-Levitt, K. M. (2003). *Local meanings, global schooling: Anthropology and world culture theory*. Palgrave Macmillan.

Bodycott, P., & Lai, A. (2012). The influence and implications of Chinese culture in the decision to undertake cross-border higher education. *Journal of Studies in International Education*, *16*(3), 252–270.

Frkovich, A. (2015). Taking it with you: Teacher education and the baggage of cultural dialogue. *Frontiers of Education in China*, *10*(2), 175–200.

Jiang, L., Zhang, L. J., & May, S. (2019). Implementing English-medium instruction (EMI) in China: Teachers' practices and perceptions, and students' learning motivation and needs. *International Journal of Bilingual Education and Bilingualism*, *22*(2), 107–119. https://doi.org/10.1080/13670050.2016.1231166

Liu, H., Xu, Y., & Lu, H. (2020). Online English reading instruction in the ESL classroom based on constructivism. *Journal of Educational Technology Systems*, *48*(4), 539–552. https://doi.org/10.1177/0047239519899341

Ma, W., & Luke, A. (2014). *East meets west in teacher preparation: Crossing Chinese and American borders*. Teachers College Press.

Ruan, Z., Zheng, X., & Toom, A. (2020). From perceived discrepancies to intentional efforts: Understanding English department teachers' agency in classroom instruction in a changing curricular landscape. *Teaching and Teacher Education*, 92, 103074. https://doi.org/10.1016/j.tate.2020.103074

Shao, G., Fan, Y., Huang, R., Ding, E., & Li, Y. (2012). Mathematics classroom instruction in China viewed from a historical perspective. In Y. Li, & R. Huang. (Eds.), *How Chinese Teach Mathematics and Improve Teaching* (pp. 29–43). Routledge.

Sun, Q., Kang, H., Chang, B., & Lausch, D. (2019). Teaching international students from Confucian heritage culture countries: Perspectives from three U.S. host campuses. *Asia Pacific Education Review*, *20*(4), 559–572.

Thakkar, D. (2011). Social and cultural contexts of Chinese learners: Teaching strategies for American educators. *Multicultural Education*, *19*(1), 51–54.

Wang, Q. (2012). Classroom teaching strategies of improving the English majors' self-instruction in newly-promoted university in China. *Theory & Practice in Language Studies*, *2*(3), 475–482. https://doi.org/10.4304/tpls.2.3.475-482

Yi, S., Yun, R., Duan, X., & Lu, Y. (2021). Similar or different? A comparison of traditional classroom and smart classroom's teaching behavior in China. *Journal of Educational Technology Systems*, *49*(4), 461–486. https://doi.org/10.1177/0047239521988999

Zhou, B. (2020). *A study of task-based language instruction in flipped English as foreign language classrooms in China* (Publication No. 28262590) [Doctoral dissertation, University of Hawai'i at Manoa] ProQuest Dissertations Publishing.

(NON)PREPARATION TO LIVE IN ANOTHER COUNTRY: CROSS-CULTURAL EXPERIENCES AS PRECURSORS OF TRANSFORMATIVE LEARNING AMONG NIGERIAN IMMIGRANTS IN ITALY

Taiwo Isaac Olatunji[1]
Monica Fedeli[2]

ABSTRACT: Migration is a significant life event that usually triggers cross-cultural preparedness and the need for learning, even transformative learning. This exploratory study answers two research questions: How do Nigerian immigrants describe their preparedness for cross-cultural transition in Italy? What are the indications of transformative learning processes and outcomes in the immigrants' narrations? Emerging results from six semi-structured interviews with six Nigerian immigrants in Italy are presented. Narratives and themes from the interviews showed evidence of preparation (nonlearning and learning) as well as nonpreparation for cross-cultural transition among the immigrants. Participants' preparedness was associated with their motivation to emigrate, cross-cultural experiences, and proficiency in the Italian language. Also, their cross-cultural experiences pointed to different aspects in processes and outcomes of transformative learning. Disorienting dilemmas of individual participants were identified. The study concluded a further inquiry could show how Nigerian immigrants' cross-cultural transition leads to various outcomes of transformative learning.

Keywords: cross-cultural transition, migration preparedness, disorienting dilemma, perspective transformation, Nigeria-Italy migration, Nigerian immigrants

Cross-cultural transition (CCT) is the psychosocial change process migrants experience when they move from their habitual sociocultural context to another. CCT happens across the physical-mental-social domain, during the predeparture, transit, and post arrival phases of migration. CCT is a universal pre integration phenomenon among intercultural migrants. The implication is immigrants' initial experiences before immersion in the second culture might have a long-term effect on their integration process. Research has established migration triggers the need for transformative learning, resulting in fundamental change in the migrant's perspective (Bethel et al., 2020; Onosu, 2020; Taylor, 1994). Meanwhile, adults make use of their aspirations and capacities for (non)migration purposes (de Haas, 2021), suggesting preparedness—which involves anticipating and responding to uncertain future experiences and outcomes (Carroll, 2010)—essentially relates to CCT. However, the role of migration preparedness in cross-cultural experiences and transformative learning has not garnered sufficient research attention.

Hence, this study explores migration experiences of Nigerian immigrants in Italy with a view to examining their preparedness for cross-cultural transition and identifying precursors/indications of transformative learning. Two research questions were developed: *How do Nigerian immigrants describe their preparedness for cross-cultural transition in Italy?* and *What are the indications of TL processes and outcomes in the immigrants' narrations?* Participants' answers to these questions would illuminate our

[1] University of Padova, Italy; taiwoisaac.olatunji@phd.unipd.it
[2] University of of Padova, Italy; monica.fedeli@unipd.it

understanding of migration/cross-cultural experiences as having or not having a deterministic connection to perspective transformation. The study explored migration experiences involving the periods before immigrants departed Nigeria, during transit, and after arrival (during their settling period in Italy). Attention was paid to two broad dimensions of preparation related to non-learning (general preparation such as visa application, shopping, etc.) and learning (acquisition of knowledge, skills, and values). Participants' experiences and preparation were explored in relation to possible connections to transformative learning. However, determining the extent of perspective transformation among participants was beyond the scope of this study.

Transformative Learning Theory

Transformative learning leads to perspective transformation by challenging and critically reviewing taken-for-granted assumptions that underpin one's habits of mind and consequent points of view (Mezirow, 2000). An individual can significantly learn from a fundamental change resulting from their "lived, felt experience" (Hoggan, 2016, p. 71). Transcultural experiences are often strong enough to cause a disorienting dilemma, which may become the basis for intercultural perspective transformation (Taylor, 2017). From its classic 10-phase model (Mezirow, 2000), Transformative Learning Theory (TLT) has evolved to a multi-strand theory or even a metatheory (Hoggan, 2016; Stuckey et al., 2013). Three dominant strands of transformative learning have emerged; they are identified as rational/cognitive, extrarational, and social/emancipatory perspectives. Stuckey et al. explain:

> One is the cognitive/rational perspective… that emphasizes rationality, critical reflection, and ideal conditions for discourse. This is a constructivist and universal view of learning… The second perspective has been called an extrarational perspective… it emphasizes the emotive, imaginal, spiritual, and arts-based facets of learning, those that reach beyond rationality… The third is the social critique perspective… that emphasizes ideological critique, unveiling oppression, and social action in the context of transformative learning. (2013, pp. 213-214)

Based on these perspectives, Stuckey et al. (2013) identified four outcomes and 15 processes as enumerated in Table 1. This study adopted the multiple perspectives because they offer an eclectic approach for exploring possible transformative learning among Nigerian immigrants in Italy. A multiple lens approach for inquiry into how Nigerian immigrants in Italy have experienced transformation is necessary to examine the cross-cultural and intercultural nature of their experiences and structures that have influenced their migratory and learning experiences. Deploying TLT as a multidimensional process was essential for this study because it focused on learning in cross-cultural settings among immigrants with potentially diverse socioeconomic and migratory biographies.

Table 1. *Outcomes and Processes of Transformative Learning*

Outcomes	Processes

• Acting differently
• Having a deeper self-awareness
• Having more open perspectives
• Experiencing a deep shift in worldview
	• Cognitive/rational
	  ○ Critical reflection
	  ○ Action
	  ○ Experience
	  ○ Disorienting dilemma
	  ○ Discourse
	• Beyond rational/extrarational
	  ○ Arts based
	  ○ Dialogue
	  ○ Emotional
	  ○ Imaginal
	  ○ Spiritual
	  ○ Soul work
	• Social critique
	  ○ Ideology critique
	  ○ Unveiling oppression
	  ○ Empowerment
	  ○ Social action

Note. Reprinted from "Developing a survey of transformative learning outcomes and processes based on theoretical principles," by H. L. Stuckey, E.W. Taylor, & P. Cranton, 2013, *Journal of Transformative Education, 11(4),* p. 217. Copyright 2016 by Stuckey et al.

Methodology

This paper reports an aspect of an ongoing exploratory sequential mixed methods study whereby the researcher commenced with a qualitative research phase and explored participants' views, analysed data, and used the information to build the quantitative phase (Creswell, 2014). Narrative research design is adopted for the QUAL component; this involved asking individual participants to provide stories about their lives (Riessman, 2008). Ten participants were selected in the Veneto Region of Italy using purposive sampling technique. Participants (interviewees) were selected based on certain criteria including year of arrival in Italy, immigration status, occupation, ethnicity, gender, and mode of transportation/entry. All participants moved to Italy when they were aged 18 or older. They were contacted at Nigerian community meetings and online platforms and by referral.

A semi-structured interview guide was used for initial exploration of Nigerian immigrants' preparedness for cross-cultural transition vis-à-vis transformative learning. The second interview with each participant delved deeper into participants' transformative learning. The self-designed *"G2G Semi-Structured Interview Guide"* helped researchers capture participants' migration stories, circumstances surrounding

their preparedness for migration to Italy, their learning experiences/initiatives, and their sociodemographics. The first interview was a precursor to the second interview, which was an in-depth exploration of context of the participant's migration and identification of possible transformative learning experiences. The instrument contains 15 open-ended questions with probes and prompts. Exemplar questions: How would you describe your life in Nigeria before coming to Italy? What motivated you to leave Nigeria? How did you prepare for moving to and living in Italy? How was the preparation and the relocation like emotionally? What and how did you learn in order to migrate and live in Italy successfully? Describe what it was like when you first landed in Italy. How were the next several days and weeks?

Each participant read the *Informed Consent Form* and was encouraged to ask questions or express concerns before signing the form and agreeing to commencement of the data generation session. At the outset of each interview, the researcher and participant discussed the inquiry's purpose, anonymity, confidentiality, incentive, and logistics (Merriam & Tisdell, 2016). All participants were referred to by pseudonyms in the research report. Interviews lasted between 45 and 60 minutes. Data analyzed in this paper were generated from semi-structured interviews with six participants. Narrative analysis and thematic analysis techniques were used to analyze the data. Thematic analysis technique is useful for highlighting commonalities and differences across a dataset while narrative analysis is helpful in the interpretive analysis of particularity and setting it in more general contexts (Shukla et al., 2014). Atlas.ti software aided data coding and analyses.

Findings

Below we present and discuss the emerging results from analysis of participants' descriptions and narrations of circumstances surrounding their immigration to Italy with two goals: determining participants' preparedness for Nigeria-Italy transition and identifying elements of the processes and outcomes of transformative learning such as disorienting dilemmas.

Preparedness for Cross-cultural Transition in Italy

In participants' narrations, patterns of preparation and non-preparation emerged. To begin, (non)preparation can be broadly parsed into two categories: general preparation for migration and migration learning.

General Preparation for Migration

General preparation refers to universal, non-specific, and even "common sense" activities and processes the emigrant performed to execute their migration plan/aspiration and ensure a successful journey and settling in their new residence. To distinguish these activities from explicitly educative activities and processes, we refer to it as *nonlearning preparation*.

Motivation To Leave Nigeria. Participants had varying reasons for leaving Nigeria and becoming immigrants in Italy. Bimpe, Amaka, and Jackson emigrated to live

with their spouses in Italy. Dele and Ajoke emigrated to live with their parents and study at graduate level. These seem to be their immediate motivations. Even though Henry decided to travel abroad after experiencing a traumatic culture clash, he said, “It didn't motivate me to go out from my nation because home is home.” Participants’ narrations indicate their motivations were connected to other factors. For instance, Jackson recounted travelling to the United States was his childhood dream, and travelling abroad was a trial in the community where he grew up in Southern Nigeria: “Basically, it was like the way you already grew up. You saw that people come from abroad and they are living better” (Jackson).

Visa Application. Normally, in modern migration systems, obtaining a visa is a basic requirement for traveling. Participants who travelled by air described how their preparation for travelling to Italy involved application for visa by themselves or with assistance of a consulting agency. Some participants recollected the process of obtaining a visa was tiresome. “Well, it was quite a long journey because the visa that we got was called a family visa” (Dele).

Not Doing Enough and Nonpreparation

Participants told stories of what should have been done better. Ajoke, who came to Italy to live with her family and study for a Master’s degree, did not have an easy way to reside in Italy legally. She obtained admission at an Italian University, but she was not granted a visa. She decided to obtain a tourist visa to a neighboring country (within the Schengen area) with the plan to enter Italy and convert her visa to a studies visa. She experienced various difficulties beyond her expectation before she got a residence permit. Against this background, Ajoke concluded she did not prepare effectively for her attempt to study in Italy:

> I should have done more, like building up my account that I was going to use for financial support. I just left it at normal earnings, like what I had, I didn’t declare enough to really prove that I could fund myself. I didn’t really convince the consular. (Ajoke)

However, despite the universality of preparing for travelling as an adult, certain circumstances might not permit what a particular migrant would regard as “preparation.” A participant, Henry, narrated how he was decieved and made to embark on a journey of which destination he did not know, even though he wanted to leave Nigeria. Thus, he insisted, “No. There was no preparation”.

> That very day I left. I went to Lagos to meet my uncle. So, from there, I was trying to do some internship at the computer village at Lagos. I was living at Ajah with my uncle because he’s, um, he’s a doctor, a nurse. He studied medicine. So, my aim was also to start off my computer life there. So, but it didn’t work as plan. So, I said, okay, uh, we, I have to travel. So, we met some agency. Of which it was my uncle that introduced me to these people. You know, I don’t know them before, but as your uncle, you don’t have that mindset that maybe your uncle, they

> will dupe you, something like that. … And they presented to me some passport. I thought it was original. (Henry)

Henry later discovered he would travel through the desert to Libya. From Libya he got to Italy by boat and was put in prison immediately because he was wrongly accused and convicted of organising and smuggling irregular migrants to Italy. Even though Henry wanted to leave Nigeria, took steps to meet his uncle, and had an "agency" that could help in realising his dream, Henry was convinced he did not have any predeparture preparation because of the manner he was made to travel. This suggests the participant recognised that being an adult, his migratory agency was taken away from him, and he was stripped of the capacity, or rather, the opportunity to make basic preparation for the journey.

Preparing by Learning (Migration Learning)

Participants engaged in intentional and unintentional learning activities at various stages of their migration periods. Such activities included learning about Italian culture and civics through books and electronic media. For instance, Bimpe had lived in an Eastern European country before going back to live in Nigeria and then migrating to Italy. Bimpe narrated how her previous travel experience was especially useful in preparation for Italy, especially in the aspect of being mindful of essential items she would need in Italy. Bimpe added, "So definitely I knew I was coming to a new country to have their own bounds, which I just have to obey." Confined within the four corners of a prison, Henry realized the need to learn about the country he was in. He learned the Italian language, civics, and geography. "When I was in prison, I studied the map of Italy, and I saw Padova" (Henry).

The Italian Language. Learning or not learning the Italian language was a significant part of participants' cross-cultural transition. While some began to learn basics of the language before coming to Italy, they did not attain a reasonable proficiency until they settled in new residences. They acknowledged centrality of the lingua franca to living successfully in Italy. Amaka started learning Italian in Nigeria: "First I needed to learn the language; I learned on Google and also used YouTube." Jackson pointedly identified the language issue as a challenge "because everything they do is the Italian language… So I had to buy an Italian dictionary ahead of time, trying to seize the opportunity in Nigeria to kind of prepare myself with little phrases and all that" (Jackson).

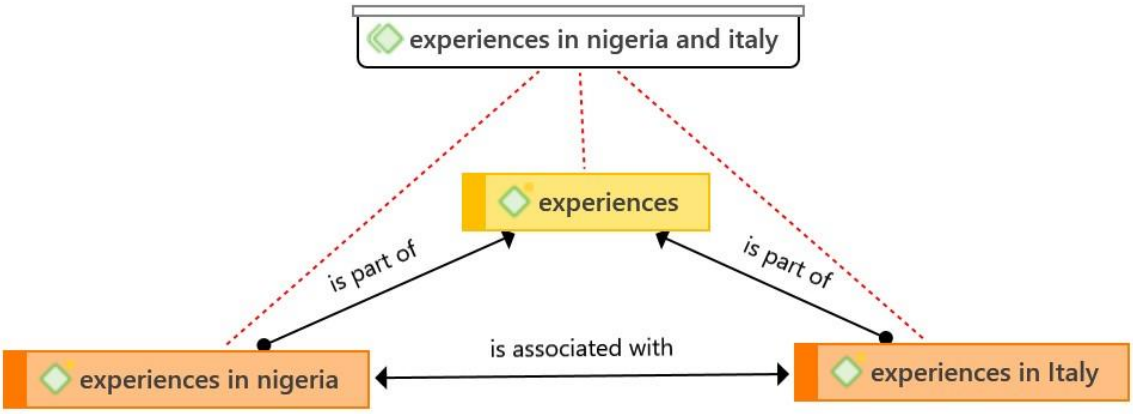
Indications of transformative learning processes and outcomes in Participants' Narrations

Emerging precursors of transformative learning from participants' narrations include their positive and negative experiences, disorienting dilemmas, and some specific transformative processes and outcomes.

Cross-Cultural Experiences at the Center of Migration (and Transformation)

Participants described various events and issues that depict their transition from Nigeria to Italy. As indicated in Figure 1, participants' migration experience cuts across events in Nigeria and Italy. The experiences include benefits of their migration and challenges they encountered.

Figure 1. *Cross-Cultural Experiences*



The Positive. Participants' narrations showed migrating from Nigeria to Italy came with lots of benefits such as having a new social network (of friends and families), Henry said, "What I learned in that journey, a little bit with some friends is that a tree can never make a forest." Jackson recounted his excitement when he joined his wife in Italy: "So, it was a little smooth excitement; we were happy!" Similarly, Ajoke was excited to join her family: "I was really excited. Number one, I've changed the environment, my family. I get to sleep, wake up with my brothers in the same house. It was really exciting for me!"

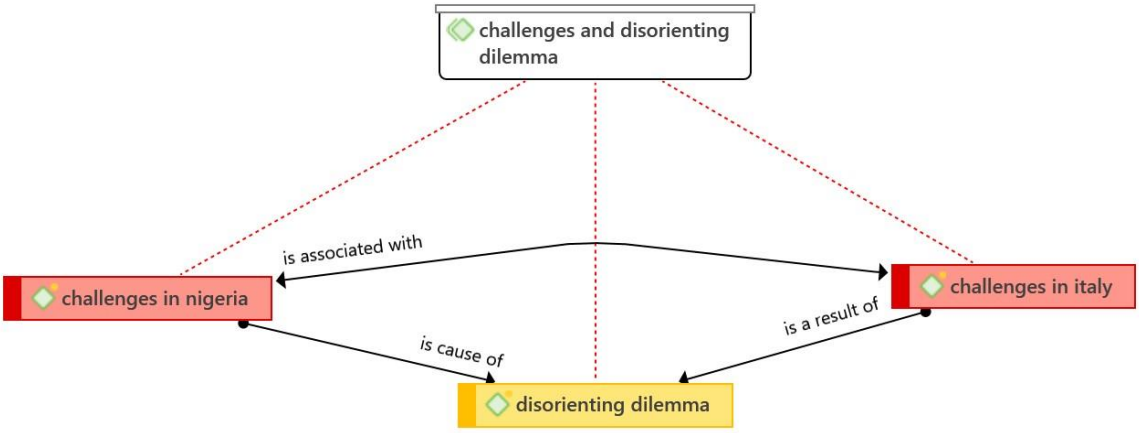
Challenges Here and There. Participants' experiences include the challenges they faced in Nigeria and in Italy. Challenges faced in Nigeria narrated by the participants include insecurity, a corrupt system, and the difficulty of obtaining a visa. Varied challenges faced in Italy include a language barrier, imprisonment, and the weather. "Like moving around, the language barrier, how the environment is, it's different from Lagos where I was coming from" (Ajoke). On the climatic differences, Dele added, "So you can imagine coming from a warm temperate, the weather condition like we have in Nigeria and arriving in here during the lower degrees."

Identifying Their Disorienting Dilemmas

Henry mentioned a culture clash he witnessed around his workplace that led to the death of three persons, including a pregnant woman. Henry was smuggled through the desert, lived a hard life in Libya, risked his life on the sea, and was incarcerated as soon as he landed in Italy. Henry experienced extreme situations before, during, and after moving to Italy, describing them as "the survival of the fittest", "slavery in another accent", "trouble to trouble" and "prison to palace." Amaka referred to the difficulty of leaving her mother

in Nigeria and coming to live with a new family in a non-English speaking country. Dele had not completed his first university degree before he left Nigeria to reside in Italy. He expressed difficulties of emotional imbalance and lack of focus because he had to juggle the two countries for some years before he settled in Italy. Ajoke experienced uncertainties when she got to Italy to change her Schengen tourist visa to a studies visa. She faced the reality of going back to Nigeria or staying in Italy as an illegal resident. Bimpe mentioned while in the process of emigrating to Italy with her son to live with her husband she lost her sister. Bimpe said it was difficult to leave her bereaved mother, but Bimpe and her child needed the company of her husband. Jackson narrated that although he was excited to meet his wife when he got to Italy, excitement soon vanished due to financial challenges and lack of structure that could enable him to get a job with his newly obtained BSc degree. Instead, Jackson became a beggar. He was frustrated because he felt that, as a man, he had the responsibility to provide for his family. As Figure 2 shows, these disorienting dilemmas are connected to cross-cultural challenges participants narrated.

Figure 2. *Disorienting Dilemmas*



Indications of Processes for Transformative Learning

Selected quotations from interviews match codes named after the processes of transformative learning. Sample excerpts below suggest how participants dealt with their experiences and disorienting dilemmas to benefit from their situations.

Cognitive/Rational.

Action: “Let me go and build up my life. Let me try to do something that will give me, that will feed me later in the future. So that was why, I started doing the work I'm doing now” (Henry).

Reflection: “I was thinking about the language… I knew that that would be a challenge” (Dele). “I began to ask some questions: why my first experience in Europe is in prison?” (Henry).

Extrarational.

Spiritual: “But you know, spiritually, when I pray, I feel relieved more, that I'm not alone in this journey” (Ajoke).

Dialogue/Support: Henry emphasised the role of communal support thus:

> … Sometimes when we see ourselves in another place in a very difficult time, you see that there is love of being from one nation. … So, there were also people that were eager to tell me what I needed to hear at that particular moment. So, we become like a family… We had to live together. We had to do that at that particular moment to survive because some people were with no money, no water, but some were with water, they didn’t have money.

Social Critique.

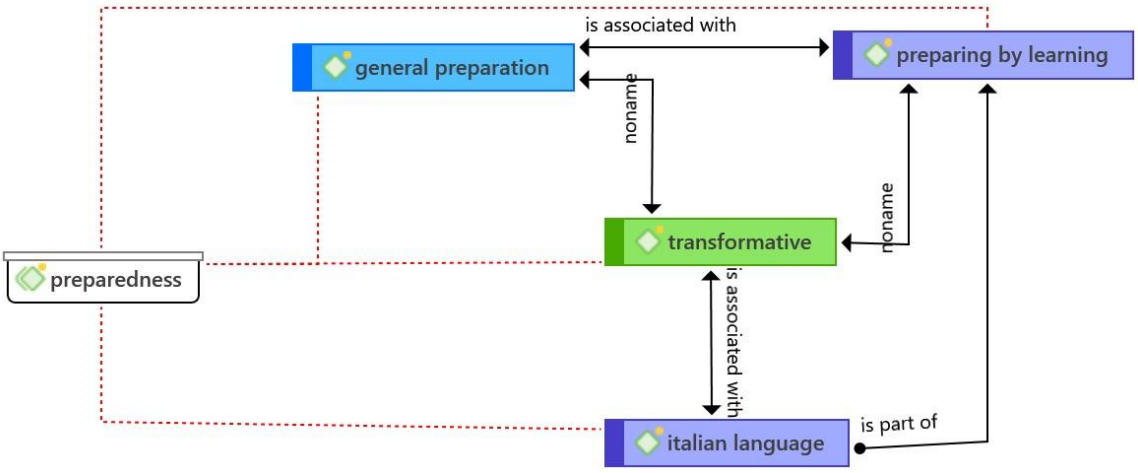
Unveiling oppression: “[In Nigeria] it's only the rich people that have access to the police and the mobile police, the soldiers” (Henry).

Empowerment: “My calling is to share a better perspective with people if they could… I wanted to go before… And I know that people who don't have that change of the mindset cannot also stay here” (Jackson).

Possible Transformative Learning Outcomes

Findings showed the Nigerian immigrants’ (non)preparation for cross-cultural transition culminated in perspective transformation. As Figure 3 indicates, different aspects of participants’ cross-cultural preparedness relate to transformative learning.

Figure 3. *Cross-Cultural Preparedness and Transformative Learning*



Participants’ narrations and reflections showed instances of certain transformative learning outcomes. For example:

Acting differently: “But the prison also prepared me to know some rules and regulation, what to do and what not to do, because there are rules and regulation on how to live in outside society when you go out” (Henry).

Shift in worldview: “So, I change my values. There will be a redirection of purpose” (Dele).

Openness: “I'm now seeing the other side of what I was not seeing before” (Jackson).

Deeper self-awareness: “One of the things I also learned is that life is easier when you smile a lot” (Amaka).

Discussion and Conclusion

Narratives and themes from interviews showed evidence of preparation (nonlearning and learning) among most participants and a trace of nonpreparation for cross-cultural transition. Participants’ preparedness was associated with their motivation to emigrate, cross-cultural experiences, and level of proficiency in the Italian language. Even though most participants demonstrated their migratory agency/capability (de Haas, 2021) in the form of migration preparedness, each participant still experienced a disorienting dilemma traceable to their unique situation and expectation. While the results confirmed migrants often become transformed after a cultural immersion (Bethel et al., 2020; Onosu, 2020; Taylor, 1994), the results also showed the experiences migrants have faced in their home/sending society are equally central to triggering of disorienting dilemmas. Individual immigrants’ disorienting dilemmas were identified, suggesting a connection to challenges participants faced across Nigeria and Italy. Also, their cross-cultural experiences pointed to different aspects of the processes and outcomes of transformative learning (Hoggan, 2016; Stuckey et al, 2013).

This paper was delimited to presenting emerging results in an on-going study. While it has indicated cross-cultural precursors of transformative learning, it has not analyzed how participating Nigerian immigrants underwent a transformative learning process. Further inquiry could show how Nigerian immigrants’ cross-cultural transition leads to various outcomes of transformative learning.

References

Bethel, A., Ward, C., & Fetvadjiev, V. H. (2020). Cross-cultural transition and psychological adaptation of international students: The mediating role of host national connectedness. *Frontiers in Education, 5*(539950), 1–12. https://doi.org/10.3389/feduc.2020.539950

Carroll, P. J. (2010). Preparedness. In R. M. Arkin, K. C. Oleson, & P. J. Carroll (Eds.), *Handbook of the uncertain self* (pp. 266–290). Psychology Press.

Creswell, J. W. (2014). *Research design: Qualitative, quantitative, and mixed methods approach* (4th ed.). Sage.

de Haas, H. (2021). Theory of migration: The aspirations-capabilities framework. *Comparative migrations studies, 9*(8), pp. 1–35. https://doi.org/10.1186/s40878-020-00210-4

Hoggan, C. D. (2016). Transformative learning as a metatheory: Definition, criteria, and typology. *Adult Education Quarterly, 66*(1), 57–75. https://doi.org.10.1177/0741713615611216

Merriam, S. B. & Tisdell, E. J. (2016). *Qualitative research: A guide to design and implementation* (4th ed.). Jossey-Bass.

Mezirow, J. (2000). Learning to think like an adult: Core concepts of transformation theory. In J. Mezirow & Associates. *Learning as transformation: Critical perspectives on a theory in progress* (pp. 3–33). Jossey-Bass.

Onosu, O. G. (2020). Cultural immersion: A trigger for transformative learning. *Social Sciences, 9*(20) 1–12. https://doi.org/10.3390/socsci9020020

Riessman, C. K. (2008). *Narrative methods for the human sciences.* Sage Publications, Inc.

Shukla, N., Wilson, E. & Boddy, J. (2014). *Combining thematic and narrative analysis of qualitative interviews to understand children's spatialities in Andhra Pradesh, India*. NOVELLA Working Paper: Narrative Research in Action. Retrieved August 25, 2022, from http://sro.sussex.ac.uk/id/eprint/49124/1/NOVELLA_NCRM_narrative_and_thematic_paper%2528030114%2529_Formatted_final.pdf

Stuckey, H. L., Taylor, E. W., & Cranton, P. (2013). Developing a survey of transformative learning outcomes and processes based on theoretical principles. *Journal of Transformative Education, 11*(4), 211–228. https://doi.org/10.1177/1541344614540335

Taylor, E. W. (1994). Intercultural competency: A transformative learning process. *Adult Education Quarterly,* 44(3), 154–174.

Taylor, E. W. (2017). Transformative learning theory. In A. Laros, T. Fuhr, & E. W. Taylor (Eds.), *Transformative learning meets building?: An international exchange* (pp. 17–29). Sense Publisher. https://doi.org/10.1007/978-94-6300-797-9_2

AN EXPLORATORY STUDY OF OLDER ADULTS' PARTICIPATION IN THE UNIVERSITY FOR THE THIRD AGE (U3A) IN GUANGXI PROVINCE, CHINA

Qi Sun[1]
Xi Lin[2]

ABSTRACT: Older adults' participation in the University for the Third Age (U3A) positively influences their physical and emotional well-being and thus increases their quality of life. However, the number of the elderly participating in the U3A has remained low in China, especially in rural areas. This study explored the factors influencing older adults' attendance in a U3A in Guangxi Province, one of the less-developed provinces in China. Results indicated that factors impact participation associated with gender, overall life quality, general health, daily life activities, self-esteem, and social relationships in the U3A. This study provides a new understanding of Chinese older adults' learning in U3A in rural provinces and may help countries with similar situations.

Keywords: older adults, participation, China

Today people are living longer. Worldwide most people can expect to live into their sixties and beyond. In 2019, there was a total of 1 billion people 60 and over; by 2030, 1 in 6 people worldwide will be 60 years or over (WHO, 2021). The increasing population of older adults living longer provides significant adult learning opportunities. Indeed, older adult education has received increased attention globally, especially in countries where the more aging adult population has reached undeniably high proportions (Findsen & Formosa, 2016).

Learning in the U3A benefits older adult learners' physical and emotional well-being and thus increases their quality of life (Findsen & Formosa, 2016; WHO, 2021). Research has been conducted on many factors impacting older adult participation, such as the impacting factors from Institutions and providers' perspectives (Gierszewski & Kluzowicz, 2021). Yet, little is known about what factors prevent older adults, especially those in rural areas, from participating in lifelong learning. This study investigates the factors influencing the participation of older adults from rural areas in China to better understand their needs and attributes regarding going to the U3A or not. The following research question guides the study: What impacts older adult learners' participation in the university for the third age (U3A)? Among the non-participants, what barriers influence their plan to participate in learning at the U3A?

Literature Review

As age increases, older adults face multiple challenges, including health problems, social isolation, and feeling "left behind," which may impact their life satisfaction (Lu & Gilmour, 2004). Lifelong learning is considered an essential and significant strategy to address later life challenges and improve their overall quality of life (Findsen & Formosa, 2016; Fuentes, 2021). Various age ranges define an older adult. Previous research divided

[1] University of Tennessee, Knoxville, qsun8@utk.edu
[2] East Carolina University, linxi18@ecu.edu

this population into young-old (ages 55 to 75) and old-old (ages 75 and beyond) (Backman et al., 2000). Currently, the United Nations defines an older person as someone over 60 (UNHCR, n.d.). Our study uses ages 60 and over to refer to older adults.

Life Satisfaction and Lifelong Learning

Life satisfaction describes the self-evaluation of one's quality of life. It is a subjective indicator of well-being (e.g., physical health, psychological). Life satisfaction has a long-established relationship between social networks and education (Fernández-Portero et al., 2017; Narushima & Diestelkamp, 2018). Researchers have noted that education is an essential social determinant of health and the relation of education to other facets of life, including health behaviors, economic resources, and stress (Fuentes, 2021). Escuder-Mollon and colleagues (2014) indicated that by learning specific subjects and attending activities (e.g., lifelong learning programs), older adults would be motivated to learn the updated information, establish a connection to the community, and actively develop personal aims in life, thus increased the quality of life.

Lifelong learning programs have been historically found to enhance participants' life satisfaction, positive health-related behaviors (e.g., less smoking, more exercise), and increase their social participation (e.g., civic engagement) (Narushima et al., 2013; Schuller, 2004). One longitudinal study found that social activities, including exercise and dancing, usually promote greater well-being and life satisfaction (Menec, 2003). Participation in lifelong learning generates positive outcomes that contribute to life satisfaction (AARP, 2000). Individuals may gain life-enhancing insight through lifelong learning, establishing social networks necessary to enhance their quality of life (Roberson, 2004). Lifelong learning is considered an activity that benefits an individual's health and well-being (Fuentes, 2021; Michalos, 2017).

Lifelong Learning Barriers

Multiple barriers challenge adult learners, including situational barriers (SB), institutional barriers (INSB), and dispositional barriers (DB) (Osam et al., 2017). Older adult learners face similar issues, if not more or worse. Lee (2018) revealed that factors related to an individual's surrounding environment, such as transportation, location of the classes, time, and economic situations, presented difficulties or reasons for older adults not attending lifelong learning programs. INSB consists of the policies and procedures of universities that prevent adult learners from participating in educational-based activities and their degree completion (Bergman et al., 2014). Therefore, researchers emphasize that support from college institutions is significant (Compton et al., 2006). DB refers to personal-specific characteristics such as fear of failure, attitude toward intellectual activity, and perceptions about the ability to succeed (Ekstrom, 1972). These characteristics would lead to adult learners' lack of confidence to succeed in learning (Osam et al., 2017).

Older adult learners generally have a significantly slower reaction time because aging leads to physical and cognitive changes; they may also suffer from fatigue and poor health (Zadworna, 2020). Therefore, they may experience a lower level of confidence with fear and anxiety in learning at their age. Besides, poor learning environments,

including lighting and seating unfriendly to older adults, and lack of motivation and support contribute to poor performance or lack of participation in lifelong learning (Boulton-Lewis et al., 2016; Sixsmith, 2013).

Further, informational (INFB) and physical (PB) barriers were added, especially for older adult learners. INFB—a lack of information regarding learning opportunities and benefits (Merriam & Baumgartner, 2020). Studies indicated that factors including a lack of program information or available courses, insufficient programming, and low interest in program topics often prevent successful participation and learning among older adult learners (Boulton-Lewis et al., 2016). PB—health-related issues influence older adults' learning and are a significant barrier for older adults to participate in learning (Boulton-Lewis et al., 2016; Wang et al., 2017; Zadworna, 2020).

The Older Learner in China

The current population of China is 1,450,387,165 (Worldometer, 2022), and China's population is rapidly aging (Xinhua News, 2017; Zhong et al., 2017). In 2019, 254 million older people were 60 and over, and 176 million older people were 65 and over. By 2040, an estimated 402 million people will be over 60, accounting for 28% of the total population (WHO, 2021). In the context of China, people who are age 60 (female is 55) would typically retire from their profession/work. With the increasing aging population, the China government has established educational institutions to provide lifelong learning opportunities for older adult learners.

The historical development of adult education enabled the Chinese government to see lifelong learning as an important part of serving older adults (Sun & Yuan, in press). Indeed, the plea for lifelong learning for the elderly has never been more urgent and receiving increased attention (Findsen & Formosa, 2016; Merriam & Kee, 2014). Chinese U3A has been established for older adults as a part of China's lifelong learning system in various communities across the country. It provides multiple life enrichment programs, including educational, recreational, cultural, health care, and community services, promoting an active lifestyle for retired adults.

Since the 2000s, the State Council of China has made national policies to expand lifelong learning opportunities for older learners (Sun & Yuan, in press). According to the 2016 national policy planning proposed by the State Council of the People's Republic of China, by 2020, every county-level city must have at least one institution for elderly learners. About 50% of townships would establish the U3A. 30% of villages would have learning facilities for the elderly. Research shows that the number of U3A arrived at 6,000, about six times that in 2017. In 2019, with the fast development of distance education, the number of U3A reached nearly 76,000, providing fully online learning programs with over 10 million participants (Diao 2021).

The Current Study

Although the enrollment of older adult learners is increasing, there is a large gap between well-developed and less-developed provinces. In 2019, for example, 53.6% of enrollment was in well-developed provinces in the Eastern region of China. In comparison, only

4.3% and 3.9% were in less-developed areas in the Northwestern and Northeastern regions, respectively (Diao, 2021). Therefore, understanding what impacts rural older learners' participation in lifelong learning activities becomes significant.

Our study explores the factors impacting older adults' participation in U3A in Guangxi, one rural province in China, to better understand their lifelong learning needs and attributes. This study may offer new understandings of the elderly lifelong learning factors to program planners, developers, policymakers, social workers, and other related personnel to develop strategies for recruitment and support policymakers of older adult learners in rural areas in China and countries with similar situations.

Methods

Using an anonymous online questionnaire comprised of the World Health Organization Quality of Life Instrument-Abbreviated Version (i.e., EUROHIS-QOL) (da Rocha et al., 2012) and Elder Learning Barriers (ELB) scale (Wang et al., 2017), we created Tencent survey platform (similar to Survey Monkey) for data collection. Through a snowball sampling approach, we distributed the survey link in Guangxi Province through WeChat, a popular social media platform used among the Chinese. The link was available for two weeks. One researcher initially recruited a participant who attended the U3A in Guangxi, China. This first participant then provided multiple referrals, snowballing multiple participants who also spread the study and WeChat link for Survey to more older adults. Each new referral offered new data until the survey link closed.

Participants

Two hundred and twenty-one (221) usable responses (69%) were collected among the total number of 321 responses (Table 1). The retirement age in China for women and men is 55 and 60, respectively. Therefore, individuals who are older than 50 years old are eligible to register for U3A. Hence, we selected participants 50 years old and above as the study participants. The ages of the 221 participants ranged from 50 to 80 years, with most of the participants (91.3%) aged from 50 to 65. Among them, 20.4% were female, while 76.5% were male. Among them, 34.4% had participated in the U3A, while 65.6% had never attended any U3A activities. Of the non-participants, 60 (27.1%) intended to participate in the U3A, and 26 (11.8%) had no intention to participate in U3A. Fifty-eight respondents (26.2%) were uncertain about their participation (see Table 1). 80% of the participants had enrolled in music-related courses, approximately 10% attended painting-related classes, and less than 10% took classes such as photography, yoga, and calligraphy.

Table 1. *Demographic Characteristics of Participants*

Characteristics	N	Percent
Age		
50-55	86	38.9%
56-60	79	35.7%
61-65	37	16.7%
66-70	12	5.4%
71-75	3	1.4%
76-80	4	1.8%
Gender		
Male	169	76.5%
Female	45	20.4%
Attended Universities for Elderly		
Yes	76	34.4%
No	145	65.6%
Plan to attend in the future		
Yes	60	27.1%
No	26	11.8%
Not Sure	58	26.2%

N=221

Instruments and Data Analysis

A combination of a shortened version of the World Health Organization Quality of Life Instrument-Abbreviated Version (i.e., EUROHIS-QOL) (da Rocha et al., 2012) and Elder Learning Barriers (ELB) scale (Wang et al., 2017) was used. EUROHIS-QOL comprises eight items (1 very poor to 5 very good). Each item represents one factor: overall QOL, general health, energy, daily life activities, esteem, relationships, finance, and home. The ELB is a 26-item questionnaire that consists of five aspects (1 not at all to 5 completely): Dispositional Barriers (DB), Informational Barriers (INFB), Physical Barriers (PB), Situational Barriers (SB), and Institutional Barriers (INSB).

According to Wang and colleagues (2017), DB represents "an individual's values, attitudes, or perceptions inhibiting participating in learning activities" (p. 473). INFB means "a lack of information about learning opportunities and benefits" (p. 473). PB refers to health-related obstacles. SB "raises from one's situation in life" (p. 473), and INSB is "those practices, procedures, and policies that place limitations on participation opportunities for adult learners" (p. 473). The Cronbach's alpha of EBT in this study ranges from 0.899 to 0.963, indicating a reliable survey result. Data were analyzed through SPSS. Binary logistic regression was used to examine the influence of life satisfaction and potential barriers on university participation behavior for the elderly. The alpha level was set at .05.

Results

RQ1: What impacts older adult learners' participation in the university for the third age?

Binary logistic regression was used to examine the impact of life satisfaction and personal characteristics on university enrollment behavior for the elderly. Women were coded as 1, and men were coded as 0. Participants were coded as 1, while non-participants were coded as 0. Results indicated a significant association between gender, overall life quality, general health, energy, daily life activities, esteem, relationship, finance, home, and participation in the university for the elderly (see Table 2). The logistic model fits the data ($\chi 2(9) = 38.78$, $p < .001$), and 72.2% of the outcomes are correctly predicted by this model.

Logistic regression shows that women were less likely to participate in the university for the elderly than their male counterparts. Additionally, for every unit, the overall life quality, general health, energy, daily life activities, esteem, the relationship, finance, and neighborhood living environment increase, and the probability of participating in U3A increases by 44%, 8%, 68%, 39%, 52%, 52%, 37%, and 8%, respectively. Similarly, female senior learners are less likely to participate in U3A by 16% of the odds. Old adults who have a higher overall life quality are more likely to participate in the university by 56% of the odds; those who have a higher level of daily life activities are more likely to participate in the university for the elderly by 47% of the odds; learners who have a higher level of relationship are more likely to participate the university for elderly by 68% of the odds, and those have a higher level of finance are more likely to participate the university for elderly by 44% of the odds. Lastly, learners with a better living environment are more likely to participate in the university for the elderly by 8% of the odds.

Table 2. *Binary Logistic Regression of Life Satisfaction of the Entire Sample*

		95% CI for Odds Ratio		
	B(SE)	Lower	Odds Ratio	Upper
Participant vs. Non-Participant				
Intercept	-2.31 (.78)**		0.10	
Gender	-1.82(.53)**	0.06	0.16	0.46
Overall Life Quality	0.44 (.30)	0.87	1.56	2.78
General Health	-0.08 (.30)	0.52	0.93	1.66
Energy	-0.68 (.33)**	0.27	0.51	0.97
Daily Life Activities	0.39 (.32)	0.78	1.47	2.77
Esteem	-0.49 (.33)	0.32	0.61	1.18
Relationship	0.52 (.33)	0.90	1.68	3.21
Finance	0.37 (.24)	0.90	1.44	2.30
Home	0.08 (.27)	0.64	1.08	1.82

* p<.1, ** p<.05, *** p<.001
N=205

RQ2: Among the non-participants, what learning barriers influence their plan to participate in the universities for the elderly?

Among the participants who have not yet enrolled in the U3A, those who planned to attend the university for the elderly were coded as 1, and those who did not have an enrollment plan and those who held an uncertain attitude were coded as 0. Binary logistic regression results indicated a significant association between learning barriers and the intention to participate in the U3A among the current U3A non-participants (see Table 3). The logistic model fits the data ($\chi 2(5) = 13.2$, $p = .02$), and this model correctly predicts 63% of the outcomes.

According to logistic regression, for every unit, the dispositional, the information, the physical, the situational, and the institutional barriers increases, and the probability of planning to participate in the university for the elderly decreases by 69%, 74%, 7%, 97%, and 62%, respectively. Similarly, senior learners who have higher dispositional barriers are less likely to participate in the U3A for the elderly by 50% of the odds; those who have a higher level of information barriers are more likely to participate in the U3A by 10% of the odds; learners who have a higher level of the physical obstacles are more likely to participate the U3A by 7% of the odds, and those have a higher level of situational barriers are less likely to participate the U3A by 38% of the odds. Lastly, learners with higher institutional barriers are more likely to participate in the U3A by 85% of the odds.

Table 3. *Binary Logistic Regression of Learning Barriers Among Nonparticipants*

		95% CI for Odds Ratio		
	B(SE)	Lower	Odds Ratio	Upper
Willing to Participate vs. Not & not sure				
Intercept	-0.18 (.47)		0.84	
DB	-0.69(.40)*	0.23	0.50	1.10
IB	0.74 (.31)**	1.14	2.10	3.88
PB	0.07 (.35)	0.54	1.07	2.14
SB	-0.97 (.44)**	0.16	0.38	0.89
INSB	0.62 (.36)*	0.93	1.85	3.72

* p<.1, ** p<.05, *** p<.001
N=137

Discussions and Conclusions

Results indicate that in Guangxi Province, a rural region in China, gender, overall life quality, general health, energy, daily life activities, esteem, relationship, finance, and neighborhood living environment impact the older adults participating in the U3A. Our study result shows that older female adults are less likely to participate in lifelong learning programs. This differs from a previous study that older female learners are more likely to engage in learning (Formosa, 2010), which presents us with a new understanding of the current context and that is worth future studies to broadly learn about their perceptions of and reason for not attending these learning programs for elderly so to serve them better.

Older adults with a higher level of overall life quality, daily life activities, positive relationships and finance, and a better neighborhood living environment are more likely to be involved in learning activities of the U3A. To a certain extent, these findings echo early studies that attending the U3A has a significant relationship between older adults' life satisfaction, including economic resources and social participation (Escuder-Mollon et al., 2014; Narushima et al., 2013; Schuller, 2004).

Education is an essential social determinant of health (Braveman et al., 2011). Interestingly, our study shows a negative relationship between health, energy, and the participation of the U3A. However, participants with better health conditions and more energy are less likely to attend the U3A. Yet, among the non-participants, those with more health-related obstacles are more likely to participate in the U3A. An early study noted that memory difficulty is the most common complaint of older adults as their ability to learn and remember information begins to decline (Hertzog & Dixon, 1994). A possible explanation is that these healthy and energetic older adults in rural China enjoy activities, such as public square dancing (广场舞)—a popular activity among mid-aged old Chinese adults, rather than classroom learning in a particular discipline and are knowledge-related that requires much mental work. Certainly, time and family situations for necessary learning resources to succeed in U3A may impact their participation. More research is needed to investigate this assumption.

Additionally, those with a higher level of esteem tend not to join lifelong learning programs, which contradicts studies' findings related to older adults' lack of self-confidence in learning, leading to their lack of motivation to attend the U3A (Osam et al., 2017). This may lead us to wonder if the learning activities' content areas cannot meet these older adults learning needs considering the program activity to be lower-level classes. More research needs to examine this hypothesis.

In terms of the barriers that influence non-participants' intention to attend the U3A, results reveal that gender does not affect their plan to participate in the U3A. One interesting phenomenon worth mentioning was that the number of male participants is more significant than that of female participants. The traditional Chinese culture may influence gender roles inside the family and social and learning activities outside, particularly in rural areas. This also indicates that learning content and needs may impact female older adults' participation. Future research may explore further.

Those with a higher level of perceptions inhibiting participating in learning activities and having more life situations barriers are less likely to participate in lifelong learning programs in the future. Interestingly, non-participants with less information about learning opportunities and benefits are more likely to plan to join the U3A. Moreover, the fewer institutional restrictions and limitations on enrollment for adult learners, the more likely an older adult would plan to participate in the U3A.

The study results argue with the previous conclusions that a lack of information about available courses or programs would deter older adults from participating in lifelong learning programs (Boulton-Lewis et al., 2016). Curiosity is an aspect of intrinsic motivation that drives student learning (Pluck & Johnson, 2011), and the information gaps—an individual's knowledge of a topic but lacks specific details—would stimulate

their learning motivation to fill the information gaps (Loewenstein, 1994). The participants in our study may have heard about the U3A but had insufficient information regarding the university programs. Therefore, this information gap and their curiosity may have led them to become interested in attending learning in the U3A.

Implications and Limitations

Overall, this study discovers that a better life quality, daily life activities, relationships, finance, and a neighborhood living environment would encourage rural Chinese older adults to participate in the U3A. Thus, improving the older adults life quality, especially those who live in rural areas, becomes vital for benefiting from lifelong learning activities. Strategies such as organizing volunteers to establish a long-lasting relationship with older adults, particularly those who usually live alone, are essential. Family members' support and encouragement while staying in strong relationships with friends are also helpful when considering participating in learning activities and becoming more attached to society and the local community. These strategies may naturally lead to access to information and social happenings and thus encourage them to learn more.

It is also critical to provide necessary facilities to improve older adults' health and welfare, including centers for information consultation, social networking, entertainment gathering, and exercise and recovery. The local government should periodically provide information about the U3A, its programs, and its benefits. The U3A should also conduct a need assessment of local older adults' situations, and learning needs to develop educational programs and public activities. Further, providing classes with different levels and helping older adults step by step would help build their learning confidence. Finally, older adults must have financial support to improve their quality of life, such as increasing the older age allowance, expanding health insurance coverage, and reducing the U3A fees to a minimum for enrollment.

Limitations exist in our study. First, this study used an online (WeChat) self-reported questionnaire method. Future research may apply qualitative studies to explore older adults' perspectives further. Second, information was collected from participants in one rural province. Thus, the results cannot represent all older adult learners in rural China. Future studies should recruit more participants in other rural areas in China. Third, snowball sampling was used in this study, and sample bias may exist. Therefore, future studies may collect data through third parties and obtain more diverse older adults' random samples to reduce sample bias.

References

AARP. (2000). *AARP survey on lifelong learning*. Retrieved from http://assets.aarp.org/rgcen ter/general/lifelong.pdf

Backman, L., Small, B. J., Wahlin, A., & Larsson, M. (2000). Cognitive functioning in ancient age. In F. I. M. Craik & T. A. Salthouse (Eds.), *Handbook of aging and cognition (*2nd ed., pp. 499–558). Erlbaum.

Bergman, M., Gross, J. P., Berry, M., & Shuck, B. (2014). If life happened, but a degree didn't: Examining factors that impact adult student persistence. *The Journal of Continuing Higher Education, 62*, 90–101. https://doi.org/10.1080/07377363.2014. 915445

Boulton-Lewis, G., Aird, R., & Buys, L. (2016). Older Australians: Structural barriers to learning in later life. *Current Aging Science, 9*(3), 188–195.

Braveman, P., Egerter, S., & Williams, D. R. (2011). The social determinants of health: Coming of age. *Annual Review of Public Health, 32*(1), 381–398. https://doi.org/10.1146/annurevpublhealth-031210-101218

Compton, J. I., Cox, E., & Laanan, F. S. (2006). Adult learners in transition. *New Directions for Student Services, 2006*(114), 73-80. https://doi.org/10.1002/ss.208

da Rocha, N. S., Power, M. J., Bushnell, D. M., & Fleck, M. P. (2012). The EUROHIS-QOL 8-item index: Comparative psychometric properties to its parent WHOQOL-BREF. V*alue in Health, 15*(3), 449–457.

Diao, H. (2021). 中国老年教育发展报告 (2019-2020). China Commerce and Trade Press.

Ekstrom, R. B. (1972). *Barriers to women's participation in postsecondary education. A review of the literature*. Washington, DC: National Center for Educational Statistics.

Escuder-Mollon, P., Esteller-Curto, R., Ochoa, L., & Bardus, M. (2014). Impact on senior learners' quality of life through lifelong learning. *Procedia-Social and Behavioral Sciences, 131*, 510–516.

Fernández-Portero, C., Alarcón, D., & Padura, Á. B. (2017). Dwelling conditions and life satisfaction of older people through residential satisfaction. *Journal of Environmental Psychology, 49*, 1–7. https://doi.org/10.1016/j.jenvp.2016.11.003.

Findsen, B., & Formosa, M. (2016). Introduction. In B. Findsen & M. Formosa (Eds.). *International perspectives on older adult education*, (pp. 1-9), Springer.

Formosa, M. (2010). Lifelong learning in later life: The universities of the third age. *The LLI Review, 5*, 1–12.

Fuentes, N. (2021). *Barriers to Lifelong Learning for Third Age Older Adults* (Publication No. 28542831) [Doctoral dissertation, California State University]. ProQuest Dissertations & Theses Global.

Gierszewski, D., & Kluzowicz, J. (2021). The role of the University of the Third Age in meeting the needs of older adult learners in Poland. *Gerontology & Geriatrics Education, 42*(3), 437–451. https://doi.org/10.1080/02701960.2021.1871904

Hertzog, C. & Dixon, R. A. (1994). Metacognitive development in adulthood and old age. In J. Metcalfe & A. Shimamura (Eds.), *Metacognition: Knowing about knowing* (pp. 227-251). MIT Press.

Lee, J. M. (2018, March). *Factors Related to Recruiting and Retaining OLLI Students*. Paper presented at the 42nd Annual Meeting of the Adult Higher Education Alliance, Orlando, FL.

Loewenstein, G. (1994). The psychology of curiosity: A review and reinterpretation. *Psychological Bulletin, 116*(1), 75–98.

Lu, L., & Gilmour, R. (2004). Culture and conceptions of happiness: Individual oriented and social oriented SWB. *Journal of happiness studies, 5*(3), 269–291.

Menec, V. H. (2003). The relation between everyday activities and successful aging: A 6-year longitudinal study. *The Journals of Gerontology Series B: Psychological Sciences and Social Sciences, 58*(2), S74–S82. https://doi.org/10.1093/geronb/58.2.S74

Merriam, S. B., & Baumgartner, L. M. (2020). *Learning in adulthood: A comprehensive guide*. John Wiley & Sons.

Merriam, S. B., & Kee, Y. (2014). Promoting community well-being: The case for lifelong learning for older adults. *Adult Education Quarterly, 64*(2), 128–144.

Michalos, A. C. (2017). Education, happiness, and well-being. In A. C. Michalos (Ed). *Connecting the quality of life theory to health, well-being, and education* (pp. 277-299). Springer.

Narushima, M., Liu, J., & Diestelkamp, N. (2013). The association between lifelong learning and psychological well-being among older adults: Implications for interdisciplinary health promotion in an aging society. *Activities, Adaptation & Aging, 37*(3), 239–250.

Narushima, M., Liu, J., & Diestelkamp, N. (2018). Lifelong learning in active aging discourse: Its conserving effect on well-being, health, and vulnerability. *Ageing & Society, 38*(4), 651–675.

Osam, E. K., Bergman, M., & Cumberland, D. M. (2017). An integrative literature review on the barriers impacting adult learners' return to college. *Adult Learning, 28*(2), 54–60.

Pluck, G., & Johnson, H. L. (2011). Stimulating curiosity to enhance learning. *GESJ: Education Sciences and Psychology, 2*(19). http://eprints.whiterose.ac.uk/74470/

Roberson, D. N. (2004). The nature of self-directed learning in older rural adults. *Aging International, 29*(2), 199–218. https://doi.org/10.1007/s12126-004-1017-0

Schuller, T. (2004). Three capitals: A framework. In T. Schuller, J. Preston, C. Hammond, A. Brassett-Grundy, & J. Bynner (Eds.), *The benefit of learning: The impact of education on health, family life and social capital* (pp. 12–33). Routledge Falmer.

Sixsmith, A. (2013). Technology and the challenge of aging. In *Technologies for active aging* (pp. 7-25). Springer.

Sun, Q., & Yuan, D. (2022). (In press). Lifelong education in China: A policy perspective. In K. Evans, W -O. Lee, J. Markowitsch, & M. Zukas (Eds.). *International Handbooks of Lifelong Learning* (IHBLLL) (3rd Ed.), (Section Two, Chapter 10). Springer.

The State Council of the People's Republic of China (2016). *国务院办公厅关于印发老年教育发展规划（2016—2020年）的通知*. State Council of the People's Republic of China. http://www.gov.cn/zhengce/content/2016-10/19/content_5121344.htm

UNHCR. (n.d.). *Older persons*. UNHCR. https://emergency.unhcr.org/entry/43935/older-persons

Wang, R., Donder, L. D., Backer, F. D., He, T., Regenmortel, S. V., Li, S., & Lombaerts, K. (2017). Development and validation of the elder learning barriers scale among older Chinese adults. *The International Journal of Aging and Human Development, 85*(4), 472–489.

World Health Organization. (2021). *Aging and health*. World Health Organization. https://www.who.int/news-room/fact-sheets/detail/ageing-and-health

Worldometer. (2022). *China population*. Worldometer. https://www.worldometers.info/world-population/china-population/

Xinhua News. (2017). *2020年我国60岁及以上老年人口将达2.55亿*. Xinhua News. http://www.xinhuanet.com//health/2017-03/24/c_1120684505.htm

Zadworna, M. (2020). Healthy aging and the University of the Third Age – Health behavior and subjective health outcomes in older adults. *Archives of Gerontology and Geriatrics, 90*,104–126. https://doi.org/10.1016/j.archger.2020.104126.

Zhong, B. L., Chen, S. L., Tu, X., & Conwell, Y. (2017). Loneliness and cognitive function in older adults: Findings from the Chinese longitudinal healthy longevity survey. *The Journals of Gerontology: Series B, 72*(1), 120–128.

CHINESE INTERNATIONAL STUDENT EXPERIENCES IN UNITED STATES HIGHER EDUCATION DURING PANDEMIC: PREPARING FOR A POST-PANDEMIC ERA

Fujuan Tan[1]

ABSTRACT: Internationalization has become a substantial part of higher education worldwide, especially in the U.S. Moreover, Chinese students make up the largest portion of the U.S.'s international higher education students. The COVID-19 pandemic has caused a disruption in higher education, especially posing considerable challenges to international students. Given the emphasis of international higher education in the U.S. and the prominence of Chinese international students in this country, as well as the sparsity of research outside large cities, this study sought to examine particular challenges posed to Chinese international students studying at universities in smaller cities in the U.S. Results indicate that this group of students experienced a myriad of hardships and challenges during the pandemic. Understanding these effects can inform international higher education programs perhaps worldwide, ultimately improving such programs to better manage crises, but also to improve normal practice.

Keywords: Globalization, internationalization; international higher education, Chinese students, pandemic

Internationalization of the student body has become a prominent feature of 21st century higher education, particularly in the U.S. (Chow, 2015; Foskett & Maringe, 2010; Weber & Duderstadt, 2008). Globalization has fed the internationalization of higher education world-wide, resulting in increasing numbers of students seeking to capitalize on opportunities preparing them for, and placing them in advantageous positions within, the expanding global marketplace, and institutions of higher education have increased efforts to accommodate this trend (Foskett & Maringe, 2010; Woodfield, 2010). U.S. higher education has led the movement toward internationalization in recent years, as its institutions hosted record numbers of higher education students from other countries, especially from China (Ge et al., 2019; Institute for International Education, 2019). Of course, the outbreak of COVID-19 recognized in early 2020 has disrupted this trend in its myriad facets – resulting in a considerable decline in international student enrollment despite acute efforts to facilitate the continuity of programs (Open doors, 2020) – leaving the future of globalization and internationalization of higher education unclear (Dorasamy & Dorasamy, 2021; Feng et al., 2021; Koo, et al., 2021; Shoukat et al., 2021; Yue et al., 2020). Because the COVID-19 disruption substantially affects the U.S. in terms international higher education, especially involving the influx of students from China, this qualitative research project probes the questions of how Chinese international higher education students perceive their experiences during the COVID-19 pandemic, and how these students make meaning of their experiences as they relate to the post-pandemic era. The research anticipates that results and discussion will generalize to a substantial portion of international higher education students and inform action toward the continuity of globalization and internationalization efforts.

[1] Morehead State University; f.tan@moreheadstate.edu

Literature Review

Globalization and internationalization are complex, multifaceted notions. Notwithstanding, at the risk of oversimplification, they are defined here along with diversity, as the three terms are closely linked and the definition of each provides context for, and thus enhances, the others. *Diversity* has been evolving as a concept for decades. Simply put, it espouses the idea that people differ and identify in almost innumerable ways, including, and reaching beyond, ethnicity, age, ability, education, skills, social identity, gender identity and expression, sex, sexuality, political affiliation, religion and socio-economic status (Queensborough Community College, 2020; Smith, 2016). In short, decades of research show that embracing and promoting diversity fosters social well-being, while avoiding discouraging diversity impedes social well-being (Tienda, 2013; Vos et al., 2016). Seemingly to the contrary, *globalization* entails "the opening up and coming together of business, trade and economic activities between nations, necessitating the need for greater homogenization of fundamental political, ideological, cultural and societal aspects of the life across different countries of the world" (Maringe & Foskett, 2010, p. 1). Such homogenization takes many overt and subtle forms; English being adopted as the language of business and science, and the integration of international knowledge being more obvious examples (Altbach et al., 2016; Rumbley et al., 2012). Controversial as the practice is, for putting identities and cultures in currently less powerful and wealthy countries risk of cooption, (Altbach et al., 2016), globalization has been largely accepted as an irreversible truth (Altbach & Knight, 2016). *Internationalization* perhaps may be interpreted as an attempt to strike a balance between diversity and globalization. It consists of the various methods used by higher education and government to understand and manage globalization and its effects to achieve and maintain overall positive outcomes (Altbach et al., 2016). Regarding higher education, these measures aim to infuse intercultural and international aspects and properties into practices of teaching scholarship and service and include such activities as internationalizing curriculum, cultivating international partnerships and relationships with various other institutions, developing programs and opportunities of study in other countries (such as international exchange programs), transnational research, and generally increasing the number and mobility of international students and faculty (Altbach et al., 2016; Foskett & Maringe, 2010; Rumbley et al., 2012). Because of vast globalization, internationalization has become crucial for higher education institutions world-wide to remain competitive (Altbach, et al., 2016; Maringe & Foskett, 2010).

U.S. higher education institutions use internationalization to fulfill their missions of graduating people ready to function and serve in diverse and global environments, but also to increase revenue through international student enrolment and to bolster their own viability by boosting reputation throughout a broadening pool of potential students (Adams et al., 2012; Cantwell, 2015; Rumbley et al., 2012). Internationalization efforts along with the nation's notoriety as an advanced country conducting cutting edge research in numerous fields has made U.S. higher education a top choice among international students (Chow, 2015). Indeed, the U.S. has remained a cardinal destination among international students for decades (Chow, 2015). International students coming to the U.S. exceeded a million in 2016 until the pandemic in 2020, setting an all-time high

in 2019 (Institute for International Education, 2019), with Chinese international students routinely constituting the largest single group (Ge et al., 2019). The onslaught of the COVID 19 pandemic in 2020 disrupted the world in most if not all aspects, including the abovementioned trends in international higher education.

In late January 2020, the World Health Organization declared the outbreak of the coronavirus now popularly known as COVID-19 an international public emergency (World Health Organization, 2020). As of July 4, 2022, 546,357,444 cases of the virus, and 6,336,415 resulting deaths, have been confirmed (World Health Organization, 2022). Since the outbreak, societies world-wide have implemented various levels of preventative measures, including quarantines, travel restrictions, business closings, curfews and other social distancing and hygiene mandates in attempts to control the spread. The overall situation – the outbreak of the virus combined with the various wide-spread measures to get it under control – has disrupted social, political, economic functioning, altering every aspect of human life from the condition of the environment to the state of individual mental health (Alqabbani et al., 2021; Dorasamy & Dorasamy, 2021; Feng et al., 2021). The world may never return to what may be considered pre-pandemic normality, as resurgences caused by newly mutated strains of the virus eaves the future of pandemic affects uncertain.

No less impacted by the pandemic is international higher education. According to UNESCO, effects of the pandemic on world education are unprecedented (UNESCO, n.d.-a; UNESCO, n.d.-b). As the pandemic ensued, institutions of higher education reacted by cancelling experiential learning experiences, internships and courses, closing or restricting campus housing, abruptly shifting to online, remote learning platforms and technologies, and modifying various assessments (Dorasamy & Dorasamy, 2021; Hamza et al., 2021; Krishnamurthy, 2020). The U.S. was no exception, as institutions in different states applied varying newly devised protocols, and an estimated 99% of institutions switched to online or hybrid course delivery by fall 2020 (Open Doors, 2020). Notwithstanding, US international student enrollment (including online delivery options) declined only 16% in Fall 2020 (Open Doors, 2020), with Chinese international U.S. enrollment numbering approximately 317,000 (Open Doors, 2021).

As might be expected, international higher education students experienced numerous challenges created or exacerbated by the pandemic (Coffey et al., 2021; Feng et al., 2021). Hastily implemented travel policies were inconsistent and subject to change (Hari, et al., 2021; Koo et al., 2021; Shoukat et al., 2021). As a result, some students were stranded in countries away from home, unable to return to reconnect with the comforts of family, friends and cultures of origin (Ge et al., 2019). Others were stuck in home countries unable to continue, in person, their planned international study experiences and programs. Both sets of students were forced to change the way they received, their education, as most institutions remaining open switched to online instead of face-to-face, delivery modes (Tan et al., 2022). Primary online delivery was new to the bulk of international students, many of whom come from cultures heretofore averse to such learning methods, or for whom such learning methods may not be conducive to cultural norms of behavior (Karkar-Esperat, 2018; Tan, 2018). Added financial burdens and

uncertainty also added to the challenges for both groups, as students and their families were suddenly unable to work to support such educational endeavors, resulting in food and housing insecurity, as well as an ever more tenuous outlook for procuring future employment (Hari et al., 2021; Weng et al., 2021). Also, as was the rest of world society, international students were subject to a lack of the ability to socialize. Humans are social beings and need social activity for well-being (Antonsich, 2010; Weng et al., 2021; Yuval-Davis, 2006). International students are no different from the overall population in this respect; however, their well-being was perhaps more taxed, as they were not only unable to socialize generally, but unable to participate in commiseration with people in similar situations. Perceptions of connectedness to home culture, host culture or other international students is important for international students' sense of well-being (Brown, 2009; Brown & Jones, 2013; Rosenthal, 2007; Sawir et al., 2008; Tran & Gomes, 2017; Weng et al., 2021); such students were denied these opportunities during the pandemic. These and other factors led to increases in feelings of stress and anxiety for international students, resulting in compromised mental health, some to the point of mental and physical health crises (Feng et al., 2021; Hou & Hall, 2019; Ni et al., 2020; Torales et al., 2020).

Asian international students in general, and Chinese international students in particular, suffered even more challenges and anxiety. Asian students studying in Western countries experience additional language challenges as the structural differences between Eastern and Western languages are often more substantial (Ge, 2021; Tan, 2018). Asians who continued to study in host countries were also subject to increases in discrimination, especially those studying in the U.S. Asians in the U.S. suffered an increase in hate crimes against Asians during this period (Koo et al., 2021). They, particularly Chinese students, experienced increased discrimination because of the ethnicization of the virus (Ge, 2021; Kandil, 2020). Chinese people continue to make up the largest segment of international students in the U.S.; these students also arguably currently face more challenges there than anywhere else.

Despite the apparent importance of understanding them, literature on the challenges and coping mechanisms of Chinese international higher education students in the U.S. is sparce. Related existing studies tend to focus on such populations in larger cities. Little has been done to illuminate and understand Chinese international higher education student experiences in less populous parts of the U.S. during the COVID-19 pandemic. This research is important to better prepare for the "new normal" of an uncertain post-pandemic world and provide optimal higher education to all students, including the largest segment of international students studying in the U.S.

As a theoretical framework, this research uses the lens of transformative learning theory, which continues to be used and developed since first advanced by Jack Mezirow in 1978 Transformative learning theory generally comprises the experience of a disorienting dilemma, which triggers critical thinking and results in new "transformed" perspective on which one operates (Cranton, 2006; Eschenbacher & Fleming, 2020; Hof, 2017; Mezirow, 1978; Mezirow, 1991). It concerns the challenge of uncritically assimilated

perspectives and the subsequent growth of a new and improved, perspective (Mezirow, 1991).

Methodology

Creswell and Creswell (2018) suggest a qualitative research design for the exploration of varied concepts and perceptions of participants. This research project employed a qualitative methodology to answer the following research questions regarding Chinese international higher education students studying in less populated areas (i.e., within considerably smaller cities) of the U.S.: (1) How do these students perceive their experience studying in such a local during the height of the COVID-19 pandemic? And (2) How do they make meaning of their experience in anticipation of an uncertain post-pandemic era?

After securing IRB approval, the researcher used in-depth semi-structured interviews asking five Chinese international students studying at two Southern state universities nine open-ended questions. One question collected demographic information; the other eight were designed to collect information on perceptions regarding their experiences with their higher education experience during the pandemic. The questions were reviewed by colleagues beforehand and questions were revised accordingly to maximize validity. Study participants were recruited using a convenience snowball technique (Noy, 2007). Interviews were conducted (two) in-person or (three) using the WebEx, real-time distance video communication application. Each interview was recorded and lasted one to two hours. Member checking was also used during and after initial interviews to ensure the accuracy of information gleaned from responses (Creswell & Creswell, 2018). Responses were analyzed using constant comparison (Glaser & Straus, 1967), Neuman's (2006) three-step coding method was used to analyze responses and identify themes.

Results

Five Chinese international students participated in the study. Three identified as male; two identified as female. Each is from a different province of China; all are the only child in their families. The average age of the five is 24.5 years. All are graduate students – two attending the main public institution, three attending a regional institution within the same Southern state – who have studied during the pandemic, and spent one to three years in the U.S. Two participants are in art programs, two are in computer science programs, and one studies business.

Seven themes were identified from responses to the eight interview questions (question one collected demographic information; two through nine collected information more directly relevant to the research questions). Five themes (themes one through five) relate to the first research question, "How do Chinese international higher education students studying in (less densely populated areas of) the U.S. perceive their experience during the height of the COVID-19 pandemic?" Two of the themes (themes six and seven) relate specifically to the second research question, "How do these students make meaning of their experience in anticipation of an uncertain post-pandemic era?" The seven identified themes are as follows: (1) Study and Travel Plan Interruption, (2) Online Learning

Challenges, (3) Isolation and Associated Feelings, (4) Increased Racial Discrimination and Resulting Sensitivity, (5) Challenges of Increased Costs for Education, (6) Survival and Growth from the Pandemic Education Experience, and (7) Positive Outlook for a Post-Pandemic Future.

Theme One: Study and Travel Plan Interruption

Three of the five participants were admitted to their programs in 2021. As a result of travel restrictions, they had to change plans and spend one semester studying online, before procuring the necessary visas and being allowed to enter the U.S. These three consider themselves fortunate, as they all knew people not lucky enough to get visas or for whom international study plans became otherwise unsustainable because of lengthy and unpredictable delays. The two other participants were already in the U.S.; they were in a sense, stranded, unable to return to China during breaks, or for any other reason, because of travel restrictions in both countries as well as for fear contracting the disease while traveling.

Theme Two: Online Learning Challenges

Four of the five participants had never taken an online course before the pandemic. Even after being allowed in the U.S., participants had to take courses online. Three of the five preferred not to take online courses and would never have chosen this delivery mode if given the choice. Part of the expressed aversion was due to the self-directedness of the online mode. Experiencing mainly student-centered educational delivery, time and learning management was new to them. Of the three required to take online courses in China their first semester, one expressed the hardship of having to attend synchronously at odd hours (because of the time difference). The other two expressed appreciation of the asynchronous delivery, which allowed them flexibility to do the work during hours more normal for them. All expressed more comfort with the online delivery mode as they got used to and became more proficient with it.

Theme Three: Isolation and Associated Feelings

The three participants beginning their programs in China expressed severe feelings of isolation, not being able to interact in online courses as they were used to doing in face-to-face environments. Even when admitted to the U.S. and able to take some courses and have some interaction face-to-face, everyone was masked and all tended to leave premises as soon as required interactions were over. So, in both scenarios, getting to know people – making friends and having discussions – was improbable if not impossible. Even the two participants, who began their learning experience in the U.S. (and, thus were able to establish some social relationships) before the pandemic struck expressed the difficulty of exceptionally limited social interactions. Understanding (and blaming no one for) the unfortunate situation did little to mitigate the feelings of isolation from living in this “different world.”

Theme Four: Increased Racial Discrimination and Resulting Sensitivity

All participants were aware of the increased racial and ethnic discrimination occurring in the U.S. during the pandemic. They saw stories in the news, and, although not experiencing any such discrimination first-hand (aside form one who reported perceiving hostile looks in public for opting to wear a mask when not officially being required to do so), they received reports from people they know who had suffered physical of verbal attacks. This situation caused further hesitancy to be social and exacerbated feelings of isolation in addition to the fear of being attacked.

Theme Five: Challenges of Increased Costs for Education

Four of the five participants mentioned frustration and challenges of increased costs related to their experience as a result of the pandemic. They expressed stress from the rising costs of food and other living essentials making their experience less enjoyable and more precarious. One mentioned knowing a person in China who had to give up plans for study abroad because of the rising costs; another participant was unable to buy a car because of rising costs attribute to circumstances ultimately caused by the pandemic, which hindered the ability to go out and experience the land beyond campus (public transportation being limited even in pre-pandemic times for small U.S. cities).

Theme Six: Survival and Growth from the Pandemic Education Experience

Put into the framework of Transformative Learning Theory, all participants expressed perceptions that they had successfully navigated the situation and grown as a result. They all experienced the dilemma of the pandemic in all aspects previously discussed. Upon reflection, they realized that the situation was not going to acutely change for better and may never go back to pre-pandemic conditions. As a result of these critical reflections, they all changed their expectations, attitudes and practices to manage the (possibly lengthy) situation. At this point, they are happy with their academic performance and abilities to adapt to new learning conditions.

Theme Seven: Positive Outlook for a Post-Pandemic Future

All participants are hopeful that conditions will continue to improve and look forward to a return to a situation more aligned with the pre-pandemic era. The three participants who began their programs in China are hopeful that the rest of their experiences will adhere to what expected pre-pandemic – that they will be able to make American friends and experience the culture more richly through increased socio-cultural interactions. Two participants suggest that universities re-establish international programs, activities, and relationships to pre-pandemic proportions as soon as possible for the health of international societal relationships and individual well-being.

Discussion and Conclusion

Responses gathered from in-depth interviews with five Chinese international students studying at two Sothern U.S. universities supports more general literature suggesting that such students have experienced greater challenges during the pandemic (Feng et al., 2021; Ge, 2021; Hari et al., 2021; Tan et al., 2022; Weng et al., 2021; Yue et al., 2020). Moreover, this research enumerates more clearly the challenges of specific Chinese international higher education students studying at universities in smaller U.S. cities. The research also displays the pertinence and benefits of transformative learning theory (Cranton, 2006; Eschenbacher & Fleming, 2020; Hof, 2017; Mezirow, 1978; Mezirow, 1991) as it applies to the experiences of international students in general, and Chinese international students studying in the U.S. under heretofore unprecedentedly challenging circumstances in particular.

This study is limited to a small number of five participants specifically from China studying in the U.S. Also, the investigator is Chinese, which presents the possibility of injected cultural subjectivity that must be acknowledged. Notwithstanding, results confirm and inform conditions that must be considered if the U.S. is to continue to effectively accommodate and educate its largest segment of international students; and protocols to protect the validity, integrity, and, thus, the usability of the generated information in terms of its generalizability were strictly followed.

Future research should expand to more U.S. universities. To the extent practicable, it should include gathering information about international students from many more ethnicities studying in the host countries and include longitudinal studies of students' post-educational activities and perceptions. Such research should be done to inform all international higher education, which is presumed to have the altruistic the goal of improving international understanding, and, thus, fostering healthy, peaceful international relationships.

References

Adams, T., Leventhal, M., & Connelly, S. (2012). International student recruitment in Australia and the United States. In C. E. Kasworm, A. D. Rose, & J. M. Ross-Gordon (Eds.), *Handbook of adult and continuing education* (pp. 399- 416). SAGE.

Altbach, P. (2016). Patterns of higher education development. In M. Bastedo, P. Altbach, & P. Gumport (Eds.), *American higher education in the twenty-first century* (pp. 191-211). John Hopkins University Press.

Altbach, P., Beisberg, L., & Rumbley, L. (2016). Tracking a global academic revolution. In P. Altbach (Ed.), *Globalization and internationalization in higher education* (pp. 15-28). Johns Hopkins University Press.

Altbach, P., & Knight, J. (2016). The internationalization of higher education. In P. Altbach (Ed.), *Globalization and internationalization in higher education* (pp. 105-120). Johns Hopkins University Press.

Alqabbani, S., Almuwais, A., Benajiba, N., & Almoayad, F. (2021). Readiness towards emergency shifting to remote learning during COVID-19 pandemic among university instructors. *E-learning and digital media*, *18*(5), 460-479. https://doi.org/10.1177/2042753020981651

Antonsich, M. (2010). Searching for belonging–an analytical framework. *Geography Compass*, *4*(6), 644-659.

Brown, L. (2009). International students in England: Finding belonging through Islam. *Journal of Muslim Minority Affairs*, *29*(1), 57-67.

Brown, L., & Jones, I. (2013). Encounters with racism and the international student experience. *Studies in Higher Education*, *38*(7), 1004-1019.

Cantwell, B. (2015). Are international students cash cows? Examining the relationship between new international undergraduate enrollments and institutional revenue at public colleges and universities in the US. *Journal of International Students*, *5*(4). 512-525.

Chow, P. (2015). What international students think about US higher education. *International Higher Education*, *65*, 10–12.

Coffey, J., Cook, J., Farrugia, D., Threadgold, S., & Burke, P. J. (2021). Intersecting marginalities: International students' struggles for "survival" in COVID-19. *Gender, Work, and Organization*, *28*(4), 1337–1351. https://doi.org/10.1111/gwao.12610

Cranton, P. (2006). *Understanding and promoting transformative learning: A guide for educators of adults* (2nd ed.). Jossey-Bass.

Creswell, J., & Creswell, J. D. (2018). *Research design: Qualitative, quantitative, and mixed methods approaches* (5th ed.). Sage.

Dorasamy, J., & Dorasamy. N. (2021). Wellness constraints among international university students transitioning through COVID 19. *Psychology and Education*, *58*(3), 3444–3456. https://doi.org/10.17762/pae.v58i3.4514

Eschenbacher, S., & Fleming, T. (2020). Transformative dimensions of lifelong learning: Mezirow, Rorty and COVID-19. *International Review of Education*, *66*(5-6), 657–672. https://doi.org/10.1007/s11159-020-09859-6

Feng, S., Zhang, Q., & Ho, S. M. Y. (2021). Fear and anxiety about COVID-19 among local and overseas Chinese university students. *Health & Social Care in the Community*, *29*(6). e249–e258. https://doi.org/10.1111/hsc.13347

Foskett, N., & Maringe, F. (2010). The internationalization of higher education: A perspective view. In F. Maringe & N. Foskett (Eds.), *Globalization and internationalization in higher education* (pp. 305–318*)*. Continuum.

Ge, L. (2021). A hermeneutic phenomenological inquiry at a Canadian university: Protective and risk factors for Chinese international students in COVID times with gender comparison. *Journal of International Students*, *11*(3), 586–607. https://doi.org/10.32674/jis.v11i3.2218

Ge, L., Brown, D., & Durst, D. (2019). Chinese international students' experiences in a Canadian university: Ethnographic inquiry with gender comparison. *Journal of International Students, 9*(2), 582–612.

Glaser, B., & Strauss, A. (1967). *The discovery of grounded theory*. Aldine Publishing.

Hari, A., Nardon, L., & Zhang, H. (2021). A transnational lens into international student experiences of the COVID-19 pandemic. *Global Networks*, 1-17. *https://*doi.*org/*10.1111/glob.12332

Hamza, C. A., Ewing, L., Heath, N. L., & Goldstein, A. L. (2021). When social isolation is nothing new: A longitudinal study psychological distress during COVID-19 among university students with and without pre-existing mental health concerns. *Canadian Psychology*, *62*(1), 20–30. https://doi.org/10.1037/cap0000260

Hof, C. (2017). Is there space for Bildung and transformative learning in the lifelong learning discourse? In A. Laros, T. Fuhr, & E.W. Taylor (Eds.), *Transformative learning meets Bildung: An international exchange* (pp. 269–278). Sense Publishers. https://doi. org/10.1007/978-94-6300-797-9_22.

Hou, W. K., & Hall, B. J. (2019). The mental health impact of the pro-democracy movement in Hong Kong. *The Lancet Psychiatry*, *6*(12), 982. https://doi.org/10.1016/S2215- 0366(19)30382-7

Institute for International Education. (2019). *Open Door fast facts*. Retrieved April 11, 2021, from http://www.iie.org/opendoors

Kandil, C. Y. (2020, March 26). Asian Americans report over 650 racist acts over last week, new data says. NBCNEWS. https://www.nbcnews.com/%20news/asian-america/asian-americans-report%20nearly-500-racist-acts-over-last-week-n1169821

Karkar-Esperat, T. M. (2018). International graduate students' challenges and learning experiences in online classes. *Journal of International Students*, *8*(4), 1722–1735.

Koo, K. K., Yao, C. W., & Gong, H. J. (2021). "It is not my fault": Exploring experiences and perceptions of racism among international students of color during COVID-19. *Journal of Diversity in Higher Education*. Advance online publication. https:// doi.org/10.1037/dhe0000343

Krishnamurthy, S. (2020). The future of business education: A commentary in the shadow of the COVID-19 pandemic. *Journal of Business Research,117*, 1–8.

Maringe, F. & Foskett, N. (2010). Introduction: Globalization and universities. In F. Maringe & N. Foskett (Eds.), *Globalization and internationalization in higher education* (pp. 1-16). Continuum.

Mezirow, J. (1978). *Education for perspective transformation: Women's re-entry programs in community college*. Teachers College Press.

Mezirow, J. (1991). *Transformative dimensions of adult learning*. Jossey-Bass.

Neuman, W. L., (2006). *Social research methods: Qualitative and quantitative approaches* (6th Ed.) Allyn and Bacon.

Ni, M. Y., Yao, X. I., Leung, K. S. M., Yau, C., Leung, C. M. C., Lun, P., Flores, F. P., Chang, W. C., Cowling, B. J., & Leung, G. M. (2020). Depression and post-traumatic stress during major social unrest in Hong Kong: A 10-year prospective cohort study. *The Lancet*, 395(10220), 273–284. https://doi.org/10.1016/S0140 -6736(19)33160 -5

Noy, C. (2007). Sampling knowledge: The hermeneutics of snowball sampling in qualitative research. *I. J. Social Research Methodology*. *11*(4). 327–344. https://doi.org/10.1080/13645570701401305

Open Doors. (2020). *Open Doors Report.* Retrieved June 27, 2022, from https://www.iie.org/opendoors

Open Doors. (2021). *Open Doors Report.* Retrieved June 27, 2022, from https://www.iie.org/opendoors

Queensborough Community College. (2020). *Definition for diversity*. Retrieved June 26, 2020, from https://www.qcc.cuny.edu/diversity/definition.html

Rosenthal, D. A., Russell, J., & Thomson, G. (2007). Social connectedness among international students at an Australian university. *Social Indicators Research*, *84*(1), 71–82.

Rumbley, L., Altbach, P., & Reisberg, L. (2012). Internationalization within the higher education context. In D. K. Deardorff, H. de Wit, J. D. Heyl, & T. Adams (Eds.), *The Sage handbook of international higher education* (pp. 3–26). Sage.

Sawir, E., Marginson, S., Deumert, A., Nyland, C., & Ramia, G. (2008). Loneliness and international students: An Australian study. *Journal of Studies in International Education*, *12*(2), 148–180.

Shoukat, S., Callixte, C., Nugraha, J., Budhy, T. I., & Irene, T. (2021). Homesickness, anxiety, depression among pakistani international students in Indonesia during COVID-19. *ASEAN Journal of Psychiatry*, *22*(7), 8.

Smith, D. (2016). The diversity imperative: Moving to the next generation. In M. Bastedo, P. Altbach, & P. Gumport (Eds.), *American higher education in the twenty-first century* (pp. 375–400). John Hopkins University Press.

Tan, F. (2018). Facilitating international Chinese students' transformation in an online course. *Adult Learning, 29* (1), 32–34.

Tan, Y., Wu, Z., Qu, X., Liu, Y., Peng, L., Ge, Y., Li, S., Du, J., Tang, Q., Wang, J., Peng, X., Liao, J., Song, M., & Kang, J. (2022). Influencing factors of international students' anxiety under online learning during the COVID-19 pandemic: A cross-sectional study of 1,090 Chinese international students. *Frontiers in Psychology*, *13*, 860289–860289. https://doi.org/10.3389/fpsyg.2022.860289

Tienda, M. (2013). Diversity ≠ inclusion: Promoting integration in higher education. *Educational Researcher*, *42*(9), 467-475. https://doi.org/10.3102/0013189x13516164

Torales, J., Marcelo, O. H., Castaldelli-Maia, J. M., & Ventriglio, A. (2020). The outbreak of COVID-19 coronavirus and its impact on global mental health. *The International Journal of Social Psychiatry*, *66*(4), 317– 320. https://doi.org/10.1177/0020764020915212

Tran, L.T., & Gomes, C. (2017). Student mobility, connectedness and identity. In L.T. Tran & C. Gomes (Eds.) *International student connectedness and identity: Transnational perspectives* (pp. 1–11). Springer.

UNESCO. (n.d.-a). COVID-19 educational disruption and responses. Retrieved February 24, 2021, from https://en.unesco.org/COVID19/education.

UNESCO. (n.d.-b). Education: From school closure to recovery. Retrieved February 24, 2021, from https://www.unesco.org/en/COVID-19/education-response.

Vos, M., Çelik, G., & Vries, S. D. (2016). Making cultural differences matter? Diversity perspectives in higher education. *Equality, Diversity and Inclusion: An International Journal*, *35*(4), 254–266. https://doi.org/10.1108/edi-11-2015-0092

Weber, L.E., & Duderstadt, J. (2008). *The globalization of higher education.* Economica.

Weng, E., Halafoff, A., Barton, G., & Smith, G. (2021). Higher education, exclusion, and belonging: Religious complexity, coping and connectedness among international students during the COVID-

19 pandemic in Australia. *Journal of International Students*, *11*(S2), 38–57. https://doi.org/10.32674/jis.v11iS2.3553

Woodfield, S. (2010). Key trends and emerging issues in international student mobility (ISM). In F. Maringe & N. Foskett (Eds.), *Globalization and internationalization in higher education* (pp. 109–124). Continuum.

World Health Organization. (2020). Statement on the second meeting of the International Health Regulations (2005) Emergency Committee regarding the outbreak of novel coronavirus (2019-nCoV). World Health Organization. Retrieved June 22, 2022, from https://www.who.int/news-room/ detail/30-01-2020-statement-on-the-second meeting-of-the-international- health-regulations-(2005)-emergency-committee-regarding-the-outbreak-of-novel-coronavirus-(2019-ncov

World Health Organization (n.d.). Overview. Retrieved July 4, 2022 from https://COVID19.who.int

Yue, H., Bai, X., Wang, J., Yu, Q., Liu, W., Pu, J., Wang, X., Hu, J., Xu, D., Li, X., Kang, N., Li, L., Lu, W., Feng, T., Ding, L., Li, X., & Qi, X. (2020). Clinical characteristics of coronavirus disease 2019 in Gansu province, China. *Annals of Palliative Medicine*, *9*, 1404–1412. http://dx.doi.org/10.21037/apm-20-887

Yuval-Davis, N. (2006). Belonging and the politics of belonging. *Patterns of prejudice*, *40*(3), 197–214.

EVALUATING TEACHING AND LEARNING IN HIGHER EDUCATION INSTITUTIONS IN A POST-COVID ERA: A REVIEW

Linda Tsevi, PhD[1]

ABSTRACT: The COVID-19 pandemic has affected all global spaces. Higher education institutions were not left out of the effect of COVID-19 as it impacted the teaching and learning needs of both faculty members and students. Through a comprehensive literature search, this paper explored teaching and learning in higher education institutions in a post-COVID era as a consequence to the pandemic. This review examined nine databases for peer-reviewed articles and book chapters published between 2020 and 2021 relating to the COVID-19 pandemic and higher education. The search terms used were 'COVID-19', 'blended learning', 'higher education', 'online learning', and 'post-COVID era'. Studies were eligible for inclusion if they related to the aforementioned items. The literature search revealed that higher education institutions in some countries, were least prepared to address the disruption that the pandemic caused especially in terms of availability of technological infrastructure**.** However, they adapted to the situation by being innovative and using available technological resources, though not without challenges. Further, the review indicated that COVID-19 has legitimized the acceptance of online education in most developing countries where traditional teaching methods have been the most recognized form of teaching and learning. Therefore, there was a need for retraining faculty members and support staff in digital literacy. Some of the teaching and learning methods that were adapted have continued even in the post-COVID era. Higher education in Sub-Saharan Africa, especially, has recognized the need for investment in extensive ICT infrastructure and the adaptation of a blend of face to face and online engagement of students. Varied ways of student assessment and innovative methods of teaching have been adopted. COVID-19 has fast-tracked higher education institutions' digital transformation by expediting the adoption of digital technology. The digital inequality educational divide has also been shown in the post-COVID era among others.

Keywords: blended learning, COVID-19, online learning, higher education, post-COVID era

COVID-19 has impacted educational institutions at all levels globally. Higher education institutions were not left out of the effect of COVID-19 as it affected the teaching and learning needs of both faculty members and students. The COVID-19 pandemic left in its wake disruptions to the lives and activities of staff, students, faculty and administrators of higher education institutions. It presented a major test to higher education institutions especially in terms of teaching and learning engagement of students while affecting faculty members and staff. Globally, most countries closed down higher education institutions at the onset of the pandemic. However, as it became clear that the pandemic would continue beyond a few months, higher education institutions transitioned to online learning. While this occurred across the globe, most countries, especially in the south, did not have the requisite infrastructure (Arnhold, 2020; Tsevi, 2021). At the height of the pandemic, the mode of teaching shifted from face-to-face to online or a blend of both at most higher education institutions. Countries in the global south had to be innovative so that their educational sectors were not further disadvantaged especially in terms of quality (African Union, 2020). Higher education institutions, especially those in the global south that were least prepared for the effects of the COVID-19 pandemic, had to quickly adapt and find innovative ways to address the teaching and learning demands that arose (Daniel, 2020).

[1] Senior Lecturer and Coordinator of the Accra Learning Centre, School of Continuing and Distance Education, College of Education, University of Ghana. Email: ltsevi@ug.edu.gh

A qualitative study of three middle eastern countries-Jordan, Lebanon and Pakistan, revealed that COVID-19 exposed inadequate technological infrastructure in all three countries. However, Jordan had an edge over Lebanon and Pakistan in that it had pre-existing infrastructure for online learning (Moghli & Shuayb, 2020). Transitioning to online learning in the three countries was also fraught with challenges such as power cuts, slow internet, and usage of technological applications such as Zoom and WhatsApp which impacted the quality of education given to students (Moghli & Shuayb, 2020). A survey of European and Central Asia (ECA) countries, indicated those who moved teaching and learning online with ease were those that had invested in digitalization strategically. Some of these countries include Finland, France, and Germany. In contrast, other ECA countries such as Bulgaria, Georgia, and Uzbekistan, that had not funded strategic digitalization struggled with their educational sector. This included higher education when the COVID-19 pandemic struck (Brajkovic et al., 2020). However, a study of the experiences of three higher educational institutions in the United Arab Emirates indicated that lessons learnt during the pandemic will be used to enhance online learning (Ashour et al., 2021). In the African sub-region, higher education institutions have had to find varied methods of engaging students during and after the peak of the pandemic (African Union, 2020; Kajita, 2021; Nawangwe, 2021; Tsevi, 2021).

Today's generation of traditional higher education students have experienced and grown with online media such as internet and artificial intelligence while COVID-19 brought even greater necessity for digital skills (Iansiti & Richards, 2020). Public higher education institutions that had Learning Management Systems in place were better prepared to switch to the online learning mode than those that had not invested in such infrastructure (Tsevi, 2021). Considering the impact of COVID-19 on the higher educational sector, this study reviewed literature about the evolution of teaching and learning in higher education institutions in a post-COVID era. Thus, the overarching research question guiding this study is: a) how has teaching and learning in higher education institutions evolved in a post-COVID era? The outcome of this review may inform the necessity of requisite digital transformation of higher education institutions in a post-COVID era especially in the global south. According to data from UNESCO, more than 1.6 billion learners in over 190 countries were affected by the COVID-19 pandemic, and this number represents 94% of students worldwide, including those at the elementary level (UN, 2020; DeVaney et al., 2020).

Methods

This review was guided by the procedures propounded by Kitchenham and Charters (2007) about conducting a systematic literature review. According to Kitchenham and Charters (2007), the review must begin with clear research question(s) to guide the process, indication of databases chosen, the search items and the selection and assessment of the studies. This review examined the implementation of online and blended learning undertaken by higher education institutions in a post COVID-19 era, as well as the evolution of teaching and learning as a consequence to the pandemic. The associated opportunities and challenges are also addressed.

Database and Search Terms

This review examined databases for peer-reviewed articles and book chapters relating to the COVID-19 pandemic and higher education published between 2020 and 2021. The databases (as shown in Table 1), were Academic Search Complete, African Journals Online, Education Research Complete, Humanities International Complete, JSTOR, Project Muse, ProQuest Ebook Central, SAGE Journals and Scopus. The search terms used were 'COVID-19', 'blended learning', 'higher education', 'online learning', and 'post-COVID era'.

Table 1. *Selected Databases*

Database	Total Number of Results	Peer Reviewed Papers/Books	Included for Literature Review
Academic Search Complete	180	180	8
Humanities International Complete	140	140	0
Education Research Complete	985	985	2
African Journals Online	49	49	6
JSTOR	45	45	2
SAGE Journals	383	383	4
Project Muse	30	30	3
ProQuest Ebook Central	6	6	2
SCOPUS	30	30	2
Total	1848	1848	29

Inclusion and Exclusion Criteria

Peer-reviewed articles and book chapters written in English between 2020 and 2021 and with full texts available were selected. The selected articles and book chapters focused on the search items 'COVID-19', 'blended learning', 'higher education', 'online learning', and 'post-COVID era'. Non-academic publications that were not linked to any search item were excluded. Research publications not written in English were not added. Publications that had not gone through the peer review process were also not included. Further publications whose full versions were not available through subscription from the researcher's institution were not added. The inclusion and exclusion criteria were validated by one university faculty member who has a background in higher education.

Review

Peer-reviewed articles and book chapters that satisfied the listed search items and the research question were selected. The search resulted in 1,848 publications which were then filtered to remove duplicates and unrelated articles. A review was then conducted to ascertain the importance of the selected studies to the proposed research question. This review discarded 1,819 publications as either duplicates or not having relevance to the

research question for this review. Thus, the remaining total of 29 publications fit the protocol developed in the methods section and were included in this study.

Results and Discussion

In this unit, answers are provided to the research question by analyzing the selected articles. The research question is 'How has teaching and learning in higher education institutions evolved in a post-COVID era?' The outcomes have been synthesized and delineated into themes such as availability of technological infrastructure, legitimization of online learning in countries where traditional teaching methods have been the most recognized, retraining of faculty members and support staff in digital literacy, attention to student mental health in a post-COVID-19 era, adaptation of a blend of face-to-face and online engagement of students, fast-tracking higher education institution's digital transformation by expediting the adoption of digital technology, revision of academic calendars of many higher education institutions, and generating new assessment methods.

Availability of Technological Infrastructure

The COVID-19 pandemic obliged higher education institutions to seek other means of teaching and learning engagement with students. Research indicated that countries that had invested technologically in higher education prior to COVID-19 were better prepared to transition to online learning than those that lacked the requisite technological infrastructure. In Europe and Central Asia, countries such as Germany, France and Denmark were better prepared to transition online than those that lacked the technological infrastructure. Countries that lacked this infrastructure in East and Central Asia, and reported 40% of the population as not having regular access to internet includes Bulgaria, Uzbekistan and Georgia. In Sub-Saharan Africa, higher education institutions had the challenge of providing adequate technological infrastructure on campuses where there were unstable Wi-Fi hotspots as well as foster digitalization. Moreover, students in rural areas and in some public institutions engaged in online learning also had a challenge of accessing stable internet, unreliable power supply, and noisy home environments (Badat, 2020; Zeleza & Okanda, 2021; Zinyemba et al., 2021).

Technological challenges affecting online instruction across the globe include weak internet speed, lack of devices, lack of inadequate space for faculty or students to engage meaningfully online. These impacted the development of the student's soft skills (Brajkovic et al., 2020). In Sub-Saharan Africa, institutions that had technological infrastructure and a Learning Management System in place were able to leverage them and enable online learning (Tsevi, 2021). Research further indicates that the existing online infrastructure at some higher education institutions did not allow for an extensive roll out of online learning until they were upgraded (Brajkovic et al., 2020; Ewing, 2021; Kajita et al., 2020). Higher education institutions in Sub-Saharan Africa, have recognized the need for investment in extensive ICT infrastructure and the adaptation of a blend of face to face and online engagement of students (African Union, 2020).

Legitimization of Online Learning

Research indicated that COVID-19 has legitimized online learning in the higher education sector because of the benefits associated with it (Ashour et al., 2021; Ewing, 2021). In developing economies, the pandemic has obliged the adoption of online learning, even though these are not without their challenges (Kang, 2021). Research has also shown that COVID-19 has greatly influenced faculty and students' adoption of virtual learning environments (Lola et al., 2021; Macharia, 2021). It is suggested that an increase in the online learning experience of students will contribute to its further development and acceptance (Ates-Cabanoglu & Cobanoglu, 2021).

Retraining of Faculty Members and Support Staff in Digital Literacy

The outcome of the review indicated the need to provide training to both faculty members and support staff as some were not equipped with the capacity to fully switch online (Brajkovic et al., 2020; Ewing, 2021). In Sub-Saharan Africa for example, a public higher education institution had to retrain its faculty and support staff to enable a smooth migration to online teaching and learning (Tsevi, 2021). According to Kajita et al., (2020), students, faculty as well as the institutions' management were not well prepared in implementing a fully pledged online learning system when COVID-19 struck. This instance of unpreparedness requires the training of all stakeholders and their capacity built in digital literacy.

Student Mental Health

Research indicated a global anxiety as a result of the COVID-19 pandemic (Cao et al., 2020; Holmes, 2020; Kaparounaki et al., 2020; Pragholapati, 2020). Studies carried out among students indicate that anxiety levels increased significantly during the pandemic and post-COVID-19. Thus, there was a need for psychological interventions to assess needs and appropriately address them. In a study by (Zhong et. al., 2020) using the COPE Brief procedure and emotional response scale (Carver, 1997), it was noted that men showed less anxiety than women. Further, participants from the rural areas exhibited less anxiety and fear than participants from the urban settings. The prevalence of COVID-19 in the urban areas led to increased anxiety and anger among urban participants (Huang et al., 2020). For international students who lived alone, self-isolation negatively impacted their mental well-being (Brajkovic et al., 2020). In the higher education sector, the COVID-19 pandemic has brought about a number of mental health challenges to students resulting from the transfer of learning online. This increased anxiety as many students believed it would affect their academic performance and subsequent future employment (Chen & Lucock, 2022).

Adaptation of a Blend of Face-to-Face and Online Engagement of Students

Online learning entails an engaging learning method using the internet (OECD, 2020). Before the COVID-19 pandemic, online learning saw a gradual growth in enrollment in the twenty-first century when it increased from 30% to 50% between 2013 and 2018 (Kaplan & Haenlein, 2016). Since the onset of the pandemic, higher educational

institutions have had to embrace online learning to enable the engagement of students as well as the completion of the academic calendar. Research indicates that going fully online has its benefits and disadvantages. Some advantages include self-directed learning, decreased time spent in traffic (especially for students living in cities in developing countries), convenience and the capability to balance learning and domestic chores. Despite these benefits, online learning comes with its disadvantages including disruptions at home during class, internet bandwidth issues, inadequate technological skills, and lack of personal computers (Almahasees et. al., 2021; Zammit, 2021). In order to address some of these shortcomings, higher education institutions rolled out a blended form of teaching and learning where students will be engaged both face-to-face and online (Macharia, 2021; Tsevi, 2021). There has also been a renewed interest in classroom learning in the post-COVID-19 era, and a need for a blend of online learning and face-to-face engagement in some institutions. In some countries in Sub-Saharan Africa, students did not fully embrace online learning because of poor internet connectivity in the rural areas and lack of stable supply of electricity (Egielewa et. al., 2022). Other research recommended blended learning to replace online learning (Al-Fodeh et al., 2021; Almahasees et al., 2021; Paudel, 2021).

Expediting Higher Education Institutions' Digital Transformation

Higher education institutions' adoption of digitalization to aid the engagement, teaching and learning of students are challenged by the digital divide indicating knowledge inequalities in the society. It shows the gap between those who have access to ICT (information, communication and technology) and those who do not. The digital divide exists not only between developed and developing countries, but also between regions within the same country such as in Japan (Wong, 2002; Nishida et al., 2014).
Higher education institutions with the requisite ICT infrastructure will improve their education services delivery faster than those with poor ICT infrastructure. Therefore, the greater the digital divide, the wider the educational opportunity gaps. COVID-19 has accelerated digital transformation in the education sector (Zeleza & Okanda, 2021). Before the pandemic, digital transformation in the higher education sector happened at a slow pace in most institutions.

Revision of Academic Calendars of Many Higher Education Institutions

Globally, many higher education institutions had to revise their academic calendars. The academic calendar for Japan and other Asian countries for instance started in April. Now it begins in September because of the disruption of the COVID-19 pandemic (Ewing, 2021; Kang, 2021).

New Assessment Methods

As COVID-19 enabled online learning, faculty members had to devise rigorous ways of assessing students online since there was either limited or no face-to-face component because of the need for required social distancing. A study by Dhonncha and Murphy (2021) indicated innovative ways of online assessment for dermatology students in Irish

universities. The assessment methods included 30 multiple choice questions using the Canvas Learning Management System. Each question has a clinical image associated that students had to study to enable the answering of the questions within 30 minutes. The authors believed that the use of clinical images prevented the students from accessing information resources available to them in the home environment while taking the 30-minute assessment.

Conclusion

The COVID-19 pandemic has presented the education system with a renewed opportunity to embrace new technology and transition online. It has acted as a catalyst that has changed the outlook for online learning in the education sector generally and the higher education sector particularly by compelling institutions to adopt either the blended form of learning or go fully online. Higher education institutional leadership has had to develop the ability to be flexible and proactive in their response to the uncertain times during and after the peak of the pandemic. More attention must be focused on student mental health in the post-COVID era. In addition, regular digital training is required for faculty members, support staff and students to keep them abreast with technological innovations. This pandemic has had its advantages as well as disadvantages. Among the advantages include the ability of higher education institutions to leverage technological benefits to foster growth and expansion in their digitalization focus though there may be still issues about the digital divide among regions in the same country. One major disadvantage in Sub-Saharan African especially, is the extreme technological divide at all levels of the educational paradigm, higher educational sector included, which has greatly impacted the deployment of technological innovations. There is therefore the need for a collaborative partnership between the public and private higher education institutions particularly in the global south. Some private higher education institutions are struggling in terms of technological infrastructure and engaging students in online teaching and learning. This collaborative partnership will enable strategic capacity building for both the private and public higher education institutions.

References

African Union (2020). Communique of the Bureau of the specialized technical committee on education science and technology of the African Union, pp. 1–3.

Almahasees Z., Mohsen K., & Amin M. O. (2021). Faculty's and students' perceptions of online learning during COVID-19. *Frontiers in Education, 6*, 1–10. https://doi.org/10.3389/feduc.2021.638470

Al-Fodeh, R. S., Alwahadni, . M. S., Abu Alhaijia, E. S., Bani-Hani, T., Ali, K., Daher, S. O., & Daher, H, O. (2021). Quality, effectiveness and outcome of blended learning in dental education during the COVID pandemic: Prospects of a post-pandemic implementation. *Education Sciences, 11*(12), 810–810.

Ashour, S., El-Refae, G. A., & Zaitou E. A. (2021). Post-pandemic higher education: Perspectives from university leaders and educational experts in the United Arab Emirates. *Higher Education for the Future, 8*(2), 219–238.

Ates-Cobanoglu, A., & Cobanoglu, I. (2021). Do Turkish student teachers feel ready for online learning in Post-Covid Times? A study of online learning readiness. *Turkish Online Journal of Distance Education, 22*(3), 270–280.

Badat, S. (2020). Reproduction, transformation and public South African higher education during and beyond Covid-19. *Transformation: Critical Perspectives on Southern Africa, 104*, 24–42.

Brajkovic, L., Nikolaev, D., & Zavalina, P. (2020). Tertiary education and COVID-19: Impact and mitigation strategies in Europe and Central Asia. World Bank's Education Global Practice.

Carver, C. S. (1997). You want to measure coping but your protocol's too long: Consider the Brief COPE. *International Journal of Behavioral Medicine, 4*, 92–100.

Cao, W., Fang, Z., Hou, G.Han, M., Xu, X., Dong, J., & Zheng, J. (2020). The psychological impact of the COVID-19 epidemic on college students in China. *Psychiatry Research, 287*, 112934

Chen, T., & Lucock, M. (2022). The mental health of university students during the COVID-19 pandemic: An online survey in the UK. *PLoS ONE*, *17*(1): e0262562. https://doi.org/10.1371/journal.pone.02622562

Daniel, S. J., (2020). Education and the COVID-19 pandemic. *Prospects, 49*, 91–96, https://doi.org/10.1007/s11125-020-09464-3

DeVaney, J., Shimshon, G., Rascoff, M., & Maggioncalda, J. (2020, May). Higher Ed needs a long-term plan for virtual learning. *Harvard Business Review.* https://hbr.org/2020/05/higher-edneeds-a-long-term-plan-for-virtual-learning.

Dhonncha, E. N., & Murphy, M. (2021). Learning new ways of teaching and assessment: The impact of COVID-19 on undergraduate dermatology education. *Clinical and Experimental Dermatology, 46*, 170–171.

Egielewa, P., Idogho, P. O., Iyalomhe, F. O., & Cirella, G. T. (2022). COVID-19 and digitized education: Analysis of online learning in Nigerian higher education: *E-Learning and Digital Media, 19*(1), 19–35.

Ewing, L. (2021). Rethinking higher education post COVID-19. In J. Lee, & S.H. Han (Eds.), *The ICT and evolution of work: The future of service post-COVID-19 pandemic,* (Vol. 1, pp. 37–54). Springer.

Holmes, E. A., O'Connor, R. C., Perry, V. H., Tracey, I., Wessely, S., Arsenault, L., … Bullmore, E. (2020). Multidisciplinary research priorities for the COVID-19 pandemic: A call for action for mental health science. *The Lancet Psychiatry, 7*(6), 547–560.

Huang, L., Lei, W., Xu, F., Liu, H., & Yu, L. (2020). Emotional responses and coping strategies in nurses and nursing students during Covid-19 outbreak: A comparative study. *PLOS ONE*;15, e0237303. https://doi.org/10.1371/journal.pone.0237303

Lola, N., Rano, A, Munira, U., Nozima,S., & Roziya, U. (2021). Basics of online teaching, usage and implementation process in the period of COVID 19. *Annals of Romanian Society for Cell Biology, 25*(1), 6457–6463.

Iansiti, M., & Richards, G. (2020). *Coronavirus is widening the corporate digital divide. Harvard Business Review*. Retrieved June, 2022, from https://hbr.org/2020/03/coronavirus-iswidening-the-corporate-digital-divide

Kajita, R. M., Nomngcoyiya, T., &Kang'ethe, S. M. (2020). The 'revolution' on teaching and learning: Implications of Covid-19 on social work education in institutions of higher learning in Africa. *African Journal of Social Work, 10*(3), 25–33.

Kang, B. (2021). How the COVID-19 pandemic is reshaping the education service. In J. Lee, J. & S.H. Han. (Eds.) *The ICT and evolution of work: the future of service post-COVID-19 pandemic*, (Vol. 1, pp. 15–36). Springer.

Kaplan, A. M., & Haenlein, M. (2016). Higher education and the digital revolution: About MOOCs, SPOCs, social media, and the Cookie Monster. *Business Horizons, 59*(4), 441–50.

Kaparounaki C. K., Patsali, M. E., Mousa, D. V., Papadopoulou, E. V. K., Papadopoulou, K. K. K., & Fountoulakis, K. N. (2020). University students' mental health amidst the COVID-19 quarantine in Greece. *Psychiatry Research, 290*, 113111.

Kitchenham, B., & Charters, S. (2007). *Guidelines for performing systematic literature reviews in software engineering*. Retrieved from https://userpages.uni-koblenz.de/~laemmel/esecourse/slides/slr.pdf

Macharia, J. K. N. (2021). The factors affecting the adoption of virtual learning environments (VLE) and learner management systems (LMS) by higher education students during and post-COVID-19 in Kenya. *Journal of Language, Technology & Entrepreneurship in Africa, 12*(2), 187–207.

Moghli, M., A., & Shuayb, M. (2020). Education under COVID-19 lockdown: Reflections from teachers, students & parents. Centre for Lebanese Studies.

Nawangwe, B. (2021). Re-thinking African higher education in the post-Covid-19 era. *In Higher Education's Response to the COVID-19 Pandemic: Building a More Sustainable and Democratic Future*, Council of Europe Higher Education Series, No. 25.

Nishida, T., Pick, J. B., & Sarkar, A. (2014). Japan's prefectural digital divide: A multivariate and spatial analysis. *Telecommunications Policy, 38*(11), 992–1010.

OECD. (2020). *The potential of online learning for adults: Early lessons from the COVID-19 crisis*. https://www.oecd.org/coronavirus/policy-responses/the-potential-of-online-learning-for-adults-earlylessons-from-the-covid-19-crisis-ee040002/.

Paudel, P. (2021). Online education: Benefits, challenges and strategies during and after COVID-19 in higher education. *International Journal on Studies in Education, 3*(2); 70–85.

Pragholapati, A. (2020). COVID-19 impact on students, pp. 1–6. https://edarxiv.org/895ed https://doi.org/10.17605/OSF.IO/NUYJ9

Tsevi, L. (2021). COVID-19 and higher education in Ghana: The case a public higher education institution. *International Journal of Multidisciplinary Perspectives in Higher Education*, *6*(1), 150–155.

United Nations. (2020). *Policy brief: Education during COVID-19 and beyond*.

Zammit, J. (2021). Adult learners' perceptions on online learning. *Asian Journal of Social Science and Management Technology, 3*(2), 84–100.

Zeleza, P. T., & Okanda, P. M. (2021). Enhancing the digital transformation of African universities: Covid-19 as accelerator. *Journal of Higher Education in Africa/ Revue de l'enseignement supérieur en Afrique, 19*(1), 1–28.

Zinyemba, L., Nhongo K., & Zinyemba, A. (2021). COVID-19 induced online learning: the Zimbabwean experience. *African Journal of Social Work, 11*(4), 223–230.

Zhong, X., Liu, X., Liu, X., Liu, J., & Zhong, X. (2020). Psychological state of college students during COVID-19 outbreak**.** *The Lancet Global Health*. Available at SSRN: https://ssrn.com/abstract=3552814 or http://dx.doi.org/10.2139/ssrn.3552814

ADULT EDUCATION FOR SOCIAL RIGHTS IN THE PRACTICE OF DEMOCRACY IN NIGERIA

Pere-ere F.T. Victor[1]

ABSTRACT: The value of upholding individuals' rights in society especially in this post-COVID-19 era can never be over-emphasized. The economic, political, cultural, and social rights of citizens set the parameters of what is expected by citizens from the government as we exist and socialise in society. It is also what gives the legal backing to citizens and what protects them from undue interferences and pressure from individuals, corporate, and government organizations. In Nigeria, serious social issues infringe on the social rights of citizens. Problems of insecurity, regular kidnapping, unemployment, and low standard of living exist. Many believe these long-lingering social issues, which are rooted in corruption, can be curbed via adult education. This will in turn bring about improved democratic practice by the government so citizens are safe and protected. This paper discusses the concept of adult education and how it can promote social rights in the practice of Nigerian democracy in the post-COVID-19 era. The paper examines related concepts on democracy and social rights and their value to national development.

Keywords: adult education, social rights, democracy

The issue of rights gained international attention after the First World War as revealed in the League of Nations. Member states agreed to maintain improved human conditions among men, women, and children and justice and fairness in the treatment of indigenous inhabitants of colonies to promote their well-being and development (Flowers, n.d.). Until the United Nations (UN) published its *Universal Declaration of Human Rights* in 1948, there were no clearly stipulated global, ubiquitous rights and fundamental freedoms (United Nations, 2015). Although historical leaders established some rights within their geographical locations—such as Cyrus the Great, who established the basis for individual rights in 539 BCE, and John of England, who signed the *Magna Carta* in 1215—rights were not universal (Oluwadayisi, 2014). Establishment of universal rights became important worldwide in promoting respect for freedom of people in all nations. UN member states and territories were given responsibilities to teach and promote the practice of the *Declaration* within their jurisdictions. This responsibility was enshrined in two covenants in 1966: the *International Covenant on Economic, Social, and Cultural Rights* and the *International Covenant on Civil and Political Rights* (United Nations, 2022).

Nigerians' rights include security, work, a high standard of living, leisure, and full pay during holidays. Even though major amendments in the Nigerian constitution and improvements in upholding the rights of citizens have been made, we fall short when it comes to the issue of securing lives and properties in Nigeria (Amnesty International, 2022). Presently, Nigerians experience a high level of insecurity and killings by the Boko Haram sect, human organ traffickers, and ritualists. Social inequality and low standard of living are issues for the majority of Nigerians who live below the poverty line (World Bank, 2022). All these factors are clear indications Nigeria has social rights issues; this has become a grave concern.

[1] Department of Educational Foundations, Niger Delta University Wilberforce Island, Bayelsa State, felixvictor3@gmail.com

Social rights empower members of society to act or speak within a social system. During the pandemic, restrictions prevented citizens from moving, buying, and acquiring food, which also impacted their livelihood. Although the lockdown was initiated to contain the spread of the COVID-19 virus, nothing such as food, water, or funds was provided for citizens. This led to health breakdown in most Nigerians. While some lost their lives, others suffered psychotic breakdowns. Most where jailed for violating restrictions. This was a complete breach of Nigerians' freedom of movement and association. The government failed to empathize with members of society and insisted on a lockdown with an air of arrogance while turning a deaf ear to the plight of citizens. While members of Nigerian society considered the government's response inhumane, citizens were in a state of double jeopardy: a state of fear of contracting the virus on one hand; and no support from authorities put in place to care on the other hand. Therefore, these issues have enhanced focus; they must be tackled in the event such scenarios (restrictions) occur in the future so members of society can live free and enjoy protection, free movement within the country, and freedom to speak and express themselves.

While some societies across the globe respected the rights of their members in the outbreak of the pandemic and the lockdowns, others did not. Those in leadership positions within those governments failed to uphold citizens' rights. Specifically, leadership failed in their role for striving toward the goal of peace, security of life and property, employment, good health, and more. According to Olumide (2022), the Nigerian government did not effectively fulfil its duties to citizens in the provision of healthcare, relief, and mobility to cushion the effect of the pandemic. This ineffectiveness displayed inability to tackle national emergencies. Emphasising the value of adult education has become imperative, especially as a vehicle to help tackle unpredictable events and offer solutions to curb the challenges of the post-COVID-19 era.

Social Rights: The Nigerian Situation in the Outbreak of the COVID-19 Pandemic

According to Amnesty International (2010), the term "Nigerian police" is synonymous with violating the rights of citizens. Abuse of power and over-stepping their duties and responsibilities are common among Nigerian law enforcement. They daily mount illegal check points, extort monies from transporters and road users, harass citizens unlawfully, and more. Unlawful torture of innocent individuals, reported to be unanimously perpetuated by the State Anti-Robbery Squad (SARS) of the Nigerian Police Force, was a more recent activity. These are just a few examples of law enforcement's oppressive behaviors; reports state they engage in other corrupt practices.

During the outbreak of the COVID-19 pandemic in 2019, many Nigerians' social rights were violated (Olumide, 2022). Most Nigerians were left to their fate, with many not knowing their rights. Although the government had a good plan to secure the bulk of the Nigerian population, provisions made to cushion the effect of the pandemic did not get to the grassroots. Most Nigerians lost their means of livelihood and starved during the lockdown, which spanned months. Robbery, jail breaks, and more crimes were the order of the day. Vaccines and funding provided were only secured by the upper class, which left most middle- to lower-class Nigerians stranded during the lockdown. According to Okolo and Godbless (2021) effects of the pandemic infringed on rights of society's

members and stalled economic growth. SocialAction, a non-governmental advocacy agency, also reported that even law enforcement agencies' actions were far from protecting the rights of citizens during the COVID-19 outbreak (Admin, 2022a).

The Federal Republic of Nigeria's *Constitution* (1999) clearly spells out 14 fundamental rights of Nigerians including the

- right to life.
- dignity of a human person.
- personal liberty.
- fair hearing.
- private and family life.
- freedom of thought.
- conscience and religion.
- freedom of expression and the press.
- freedom of peaceful assembly and association.
- freedom of movement.
- freedom from discrimination.
- freedom to acquire and own immovable property anywhere in Nigeria.
- freedom to compulsory acquisition of property.
- freedom from restriction and derogation from fundamental rights, special jurisdiction of high content and legal aid.

The *International Covenant on Economic, Social, and Cultural Rights*, a resolution adopted in 1966 by the UN General Assembly, includes right to security, employment, improved standard of living, food, water, housing, and a healthy environment (Ogunde, 2019; OHCHRA, 2022).

Several amendments to the *Constitution* since 1999 were made to improve our laws and rights. However, the reality of adhering to the *Constitution* in practice falls below expectations, as major implementation issues remain in Nigeria's present-day democracy. Ogunde (2019) opines the Nigerian government has not satisfactorily protected the rights of Nigerians to meet the required international standard of respecting, protecting, and fulfilling human rights. On the contrary, what we experience presently are a high level of insecurity, unemployment, low standard of living, and similar challenges. Constant insurgency exists in the south and northeast, and kidnappings of school children and innocent citizens of Nigeria across the nation are on the rise.

Scholars argue social rights are not contained in the Nigerian *Constitution*; therefore, government cannot be held accountable. For instance, Oluwadayisi (2014) opines these social rights were grafted into the Nigerian *Constitution* as stated in sections 16-18, 20, and 24; Ogunde (2020) believes they are not. These scholars suggest these rights be engrafted into the *Constitution* so government can be held accountable when there is a breach. Irrespective of these disparities among scholars, Shehu (2013) suggests the issue on social rights has gone beyond its inclusion or non-inclusion in the *Constitution*. Rather, he emphasises enforcement of social rights regardless of these debates.

Furthermore, Oluwaseun (2021) proposes the Nigerian condition has become extreme when it comes to issues of employment, adding that 55% of youths are jobless, with a high poverty and birth rate in rural areas. According to Okolo and Godbless (2021) this is caused by lack of strong institutions.

Studies show the Nigerian state is drifting far from upholding provisions of the *Constitution*. John (2011) stated there is a clear breach by leaders who are supposed to uphold the law. This is evident in their disregard for constitutional provisions. Several accounts record failure by government to provide security; governors and leaders have asked members of their states to defend themselves in the event of an attack from their assailants (Akinsanmi, 2022). Yakubu (2021) blames the current state of our insecurity on the federal system Nigerians operate, which he believes has resulted in the present poverty state and debt. Many fear all this may lead to anarchy and bring Nigeria finally from a near 'failed state' condition to a failed one.

Expectations of Nigerian Democracy in Maintaining Social Rights in Post COVID-19 Era

Since 1999, Nigeria has practiced a system of government known as democracy. According to Burns et al. (1984) and Edosa (2014), democracy is government by the people, for the people, and of the people. Democracy is a type of government that allows members of society to be elected to leadership positions as representatives of their state, local government areas, and country. Democracy also allows members of society to decide freely who becomes their leader (Oxford University Press, 2022). When leaders are elected to power in a democratic system, they are expected to uphold and protect the rights of citizens and improve the operation and practice of relevant institutions in society. Furthermore, they are expected to promote freedom, justice, equity, and fairness. According to Olanrewaju (2021), Nigeria has a leadership problem as leaders are self-centred, unwilling to develop themselves, promoters of nepotism, and non-visionary.

The three arms of government are legislative, executive, and judiciary; all have corresponding institutions set up by the government to create, execute, interpret, and enforce the law. Rotberg (2021) and Campbell and Rothberg (2021) opine government has failed to keep citizens safe and secure in Nigeria, which is evident in the high level of corruption, inconsistent leadership, and inability to tackle insurgency. This means government does not effectively carry out its functions and uphold rights of citizens in our democracy. When key institutions set up to carry out the functions of varying arms of government failures, the government has also failed. It is the responsibility of every government to strengthen institutions under its various arms and other institutions in society. When these institutions are strong, they function effectively and unanimously to achieve goals of the government, which are to foster peace, security, equity, fairness, and justice among citizens.

Key players in the practice of any democracy are adult citizens in society. According to Victor and Asuka (2021) adults sit at the helm of affairs and drive down development. The issue of rights deals directly with adults who are stakeholders in society and who can be found in families as parents, workers like counsellors, teachers, producers, or heads of

industries and parastatals. Each stakeholder has a role to play in upholding social rights of members of society and taking responsibility to be knowledgeable about these rights. Olumide (2022) opined these rights were infringed on during the outbreak of the COVID-19 pandemic. For instance, 20% of full-time workers were relieved from work without any form of remuneration from the government. (Kabir, 2020). COVID-19 grants that should have been awarded to members of society were hijacked by corruption, and palliatives meant for the public were too meagre per household (Macauley, 2022; Admin, 2020b). According to the United Nations (2020), countries who shaped their responses based on human rights responded to human needs in their societies through measures such as providing emergency water supplies in poor neighbourhoods and emergency shelters for the homeless, suspended housing evictions for unpaid rent, preserved jobs and wages by providing grants for citizens, supported businesses, and extended paid sick leave and unemployment benefits to workers. This was not the case in Nigeria. Many believe if Nigeria's key players were well rounded about social rights and valued them, leaders would have been more humane in enforcing lockdowns and given top priority to social rights of citizens.

A leader's calibre is determined by personality, which is made up of upbringing, level of integrity, experience, knowledge, belief, and values (Ruiz, 2020). These underlying factors are important to note because personality is highly determinate of an individual's leadership style. For a laissez-faire leader, everything goes; this style can bring a downturn to realising the goals of government. Should leaders in society have poor knowledge of what is expected of them and a carefree attitude, they are more likely to have poor results. I believe a leader should be well-educated and knowledgeable about social rights, well-experienced with coping skills and methods to tackle challenges, and uphold good values to be better prepared to handle the affairs of society humanely, especially in unpredictable situations such as the COVID-19 outbreak. Such a leader will perform due diligence to members of society. Democratically elected leaders should, therefore, possess the right qualities and should be capable of fulfilling expectations of members of society who elected them to power.

Lingering social issues before, during, and after the pandemic have revealed a gap in the practice of Nigerian democracy with glaring evidence of poor governance, weak leadership structure, and the violations of social rights. According to Victor and Asuka (2021) an educated adult population is required for Nigerians to experience a positive change in the practice of democracy where the social rights of citizens are respected. Since the advent of civilian rule in 1999, Nigerians have yet to reap the full dividends of democracy in a suitable environment where citizens enjoy their rights. It has, therefore, become critical to educate Nigerian adults on the implication of these issues and value of upholding citizens' rights.

Adult Education for the Promotion of Social Rights in the Practice of Nigerian Democracy

According to Adesokan and Olawuni (2018) one purpose of adult education is to promote national development. Adults' learning has become imperative to achieve the result of positive change in their attitude or behaviour. Adult education is not a new ideology in

society. Scholars such as Freire (2000) and Nyerere (1975) have used the art of educating adults to bring about positive changes in the personal experiences of individuals and society at large. According to Nzeneri (2012), adult education is a vehicle of change with many branches, among which is lifelong education that emphasizes the value of learning for life. Adult education is a veritable instrument for training and retraining the adult population who need to keep abreast of changes to adapt to new ideas, knowledge, and skills in an evolving society. Promoting lifelong learning is critical due to rapid developments in technology, the environment, and knowledge in this ever-changing world so society can adapt and function effectively.

Studies have shown a direct link and positive impact between development and maintaining an educated population (Berger & Fisher, 2013; Elizabeth, 2011; United Nations, 2003). Many believe a society with an educated population will experience socio-economic development. Social rights of members of society were violated during the pandemic's outbreak. For instance, Olokor (2021) reported security operatives put in place by government were top violators of citizens' rights during the pandemic. SocialAction (Admin, 2020a, 2020b) lamented the loss of innocent Nigerians' lives at the hands of security operatives and the poor quality of food, quantity, and discrepancies in the distribution of palliatives during the pandemic. Akubo et al. (2020) reported killings of innocent Nigerians by security operatives who were trying to enforce the lockdown. Obiezu (2020) reported a hungry Nigerian mob broke into a warehouse with palliatives that were not distributed during the lockdown. This is a clear indication of social rights violations with no peace and safety for most Nigerians. One may argue these violations may result from the fact a large number of Nigeria's adult population are non- or semi-literate; however, statistics show both the literate and non-literate adult populations in Nigeria suffered harsh economic impacts and adopted negative coping strategies, both of which threatened human capital during the pandemic (Lain & Vishwanath, 2021).

The educational sector, among other sectors, displayed some level of professionalism in adapting to challenges of the outbreak. For instance, educational institutions switched to online and distance learning using social media platforms and learning applications. Education brings about development and improvement. Kingdom and Maekae (2013) opined education inculcates knowledge, skills, character, and value into citizens; thus, education provides necessary manpower for material productivity resulting in socio-economic development. As expressed above, tackling social rights issues via adult education is highly important. I believe educating the adults who are major stakeholders in society about social rights will prevent a reoccurrence of these violations during any outbreak in the future.

Education can help promote the practice of social rights. According to Banerjee (2021), a knowledge gap on the issue of human rights exists. Among several studies on it, none deals with all aspects of violations. Bajaj (2011) and Banerjee (2021) opined teachers can play a major role in human rights education by promoting awareness to curb violations. In the same vein, adult education can promote social rights through formal, nonformal, and informal education. Social protection education can be adopted into adult basic education (ABE) programme at the basic, intermediate, and advanced levels and direct certificated courses for leaders and other stakeholders in society. The public can be

enlightened on social rights and their value. It is important for leaders and stakeholders to uphold citizens' rights and for citizens to know their rights and speak up for themselves when these rights are violated.

According to Fayoyin (2013) advocacy can bring about positive results in social development regardless of its challenges. For instance, The Share a Child Movement Inc. (n.d.) advocates for child rights protection among other actions. The organization establishes organised units in communities and, with help from community advocates, organises training and campaigns to promote awareness among community members. In the same vein, communities in Nigeria can mobilise for advocacy to promote social rights. Adults in communities can be educated about social rights, their values, how to tackle social rights issues, and services available to people in the event of violations. This education can begin with activities such as mobilising community advocates, promoting strategic partnerships between government and communities, and creating awareness on social issues. Members of society need to enjoy security and safety as their rights and learn government can be held accountable in the event of a breach.

Reports during the pandemic indicated most youths lost their jobs and means of livelihood while others were displaced. Many could no longer afford a comfortable living and could not afford Medicare. I believe that, through adult education, those who lost their jobs can acquire coping skills so they can adapt to changes and tackle challenges. Through neoliteracy, the illiterate youth population can acquire skills to become employable. Furthermore, acquiring skills on the economics of generating and saving funds use of the internet and applications—which was almost impossible to do without during the lockdown—can be promoted. These trainings can be driven down to the grassroots and carried out in adult education centres in Nigeria's Local Government Areas.

Conclusion

The COVID-19 pandemic outbreak revealed a lot about societies, including their level of preparedness in securing the lives and properties of their citizens and how they value the rights of their citizens. The outbreak changed the narrative on how the world works. The challenges birthed by COVID-19 in Nigeria still linger in our social existence, with many left unanswered. Adult education provides several fora where individuals can maximise their advantage and adapt in this ever-changing world. If ever we are to reap the full dividends of democracy—especially in upholding citizens' rights—the adult population of Nigeria requires adult education.

References

Adesokan, K. S., & Olawuni, A. O. (2018). Socio-economic development of developing countries: the role of adult education. In K. Kazeem, A. A. Kofoworola, O. T. Ogidan, & B. M. Oni (Eds.), *Understanding Adult Education Practice in Nigeria. Essays in honour of Professor Kehinde Oluwaseun Kester* (pp. 96–99). John Archers.

Admin. (2020a, April 29). Human rights violation during the COVID-19 lockdown in Nigeria. *SocialAction*. https://saction.org/human-rights-violations-during-covid-19-lockdown-in-nigeria/

Admin. (2020b, April 30). Discrepancies, sharp-practices, compromising covid-19 food palliatives in rivers state - Covid-19 situation room. *SocialAction*. https://saction.org/discrepancies-sharp-practices-compromising-covid-19-food-palliatives-in-rivers-state-covid-19-situation-room/

Akingboye, O. (2021, February 24). AfDB president backs restructuring, canvasses United States of Nigeria. *The Guardian*. https://guardian.ng/news/afdb-president-backs-restructuring-canvasses-united-states-of-nigeria/

Akinsanmi, G. (2022, [July 3]). Matawalle's call for self-defence. *Thisday Newspaper*. https://www.thisdaylive.com/index.php/2022/07/03/matawalles-call-for-self-defence/

Akubo, J., Olaniyi, S., Oludare, R., & Muanya, C. (2020, April 17). Outrage over killings during lockdown. *The Guardian Newspaper.* https://guardian.ng/news/outrage-over-killings-during-lockdowns/

Amnesty International. (2010, August 17). "Everyone's in on the game": Corruption and human rights abuses by the Nigerian police force. https://www.hrw.org/report/2010/08/17/everyones-game/corruption-and-human-rights-abuses-nigeria-police-force

_____. (2022). Everything you need to know about human rights in Nigeria. Retrieved July 13, 2022 from https://www.amnesty.org/en/location/africa/west-and-central-africa/nigeria/report-nigeria/

Banerjee, A. (2021, June 26-27). *Human rights violations in India*. [Invited talk]. National E-conference on Human Rights Issues, Social Problems, and Changes in 21st Century, Ranchi, Jharkhand, India. https://www.researchgate.net/profile/Anirban-Banerjee-2/publication/352765776_HUMAN_RIGHTS_VIOLATIONS_IN_INDIA/links/60d72e14458515d6fbdb3583/HUMAN-RIGHTS-VIOLATIONS-IN-INDIA

Bajaj, M. (2011). Teaching to transform, transforming to teach: Exploring the role of teachers in human rights education in India. *Educational Research*, *53*(2), 207–221. https://doi.org/10.1080/00131881.2011.572369

Berger, N., & Fisher, P. (2013, August 22). *A well-educated workforce is key to state prosperity*. https://www.epi.org/publication/states-education-productivity-growth-foundations/

Burns, J. M., Peltason, J. W., & Cronin, T. E. (1984). *Government by the people: The dynamics of American national goverment* (12th ed.). Prentice-Hall.

Campbell, J., & Rotberg, R. I. (2021, May 31). The giant of Africa is failing. *Foreign Affairs.* https://www.foreignaffairs.com/articles/africa/2021-05-31/giant-africa-failing

Edosa, E. (2014). Between convention and realism: The Nigerian people's definition of democracy. *Afrrev Ijah: An International Journal of Arts and Humanities, 3*(2), 158–178. https://doi.org/10.4314/ijah.v3i2.10

Elizabeth, K. (2011, January 28). *Education is fundamental to development and growth*. https://blogs.worldbank.org/education/education-is-fundamental-to-development-and-growth

Fayoyin, A. (2013). *Advocacy as a strategy for social change: A qualitative analysis of the perceptions of UN and Non-UN development workers. Journal of Social Sciences, 35*(2), 181–193. https://doi.org/10.1080/09718923.2013.11893158

Federal Republic of Nigeria. (1999). *Constitution of the Federal Republic of Nigeria*. http://www.nigeria-law.org/ConstitutionOfTheFederalRepublicOfNigeria.htm

Flowers, N. (n.d). A short history of human rights. University of Minnesota Resource Centre. http://hrlibrary.umn.edu/edumat/hreduseries/hereandnow/part-1/short-history.htm

Freire, P., Ramos, M. B., & Macedo, D. (2000). *Pedagogy of the oppressed, 30th anniversary edition* (30th anniversary ed.). Continuum.

John, E. O. (2011). The rule of law in Nigeria: Myth or reality? *Journal of Politics and Law*, *4*(1), 211–214. https://doi.org/10.5539/jpl.v4n1p211

Kabir, A. (2020, December 27). Beyond numbers: Sad tales of Nigerians who lost their jobs because of COVID-19. *Premium Times*. https://www.premiumtimesng.com/news/top-news/433479-beyond-numbers-sad-tales-of-nigerians-who-lost-their-jobs-because-of-covid-19.html

Kingdom, E. O., & Maekae, J. (2013). The role of education in national development: Nigerian experience. *European Scientific Journal*, *9*(28), 312–320. https://doi.org/10.19044/esj.2013.v9n28p

Lain, J., & Vishwanath, T. (2021, November 16). *The COVID-19 crisis in Nigeria: What is happening to welfare? New data call for expanded social protection in Africa's most populous country*. https://blogs.worldbank.org/africacan/covid-19-crisis-nigeria-whats-happening-welfare-new-data-call-expanded-social-protection

Macauley, F. (2022, July 25). Corruption and COVID-19 funds. *The Nation*. https://thenationonlineng.net/corruption-and-covid-19-funds/

Mailafia, O. (2021, August 30). Is Nigeria a failed state? *Vanguard.* https://www.vanguardngr.com/2021/08/is-nigeria-a-failed-state-2/

Mohammed, Y. (2021, February 24). Tongue as man's worst enemy. *The Guardian.* https://guardian.ng/opinion/tongue-as-mans-worst-enemy/

Nyerere, J. K. (1975). *Education never ends: The 1969 and 1970 New Year's Eve addresses to the nation in NAEAT adult education & development in Tanzania*. National Adult Education Association of Tanzania.

Nzeneri, S. I. (2012*). Handbook on adult education: Principles and practices.* Abigaba Associates.

Obiezu, T. (2020, October 26). Nigerians justify massive looting of COVID-19 supplies. *Voice of America*. https://www.voanews.com/a/covid-19-pandemic_nigerians-justify-massive-looting-covid-19-supplies/6197611.html

Ogunde, O. (2019, September 19). The argument for economic and social rights. *Stears*. https://www.stearsng.com/article/the-argument-for-economic-and-social-rights-in-nigeria/

OHCHRA. (2022). *International covenant on economic, social and cultural rights*. United Nations. https://www.ohchr.org/en/human-rights/economic-social-cultural-rights

Okolo, P. O., & Godbless, H. M. (2022). COVID-19 disruptions and the implications for Africa's Integration and development. In A. T. Usman & W. Sharkdam (Eds.), *Perspectives on Regional Integration, Security and Development in Africa: Essays in Honour of Prof Amadu Sesay* (pp. 4–6). Nigerian Defence Academy.

Olanrewaju, S. (2021, April 26). Nigeria and leadership failure. *Nigerian Tribune*. https://tribuneonlineng.com/nigeria-and-leadership-failure/

Olokor, F. (2021, November 24). Security agents worsened rights violation during COVID-19. *Punch*. https://punchng.com/security-agents-worsened-rights-violations-during-covid-19-lockdown-reps/

Olumide, S. (2022, April 13). How COVID-19 exposes Nigerian's poor government's structure. *The Guardian.* https://guardian.ng/news/covid-19-has-exposed-quality-of-leadership-in-nigeria-says-okogie/

Oluwadayisi, A. O. (2014). Economic and socio-cultural rights in the democratic governance of Nigeria: Enforcement mechanisms beyond justiciability. *Nnamdi Azikiwe University Journal of International Law and Jurisprudence, 5*, 105–117. https://www.ajol.info/index.php/naujilj/article/view/136310

Oxford University Press. (2021). Democracy. *Wikipedia The Free Encyclopedia.* Retrieved February 24, 2021, from https://en.wikipedia.org/wiki/democracy

Rotberg, R. I. (2021, May 27). Nigeria is a failed state. *Foreign Policy.* https://foreignpolicy.com/2021/05/27/nigeria-is-a-failed-state/

Ruiz, J. (2020, June 15). How to determine your executive caliber. *Forbes.* https://www.forbes.com/sites/forbesbusinesscouncil/2020/06/15/how-to-determine-your-executive-caliber/?sh=31e7f4d87bb6

Shehu, A. T. (2013). The enforcement of social and economic rights in Africa: The Nigerian experience. *Journal of Sustainable Development Law and Policy, 2*(1), 101–120.

The Share a Child Movement Inc. (n.d.). *Community development and advocacy program*. http://www.theshareachildmovement.org/index.php/program-areas/community-development-and-advocacy

United Nations. (2003). *Population, education and development: The concise report.* https://www.un.org/development/desa/pd/sites/www.un.org.development.desa.pd/files/files/documents/2020/Jan/un_2003_concisereport_en.pdf

_____. (2015). Universal declaration of human rights (UDHR). https://www.un.org/en/udhrbook/pdf/udhr_booklet_en_web.pdf

_____. (2020, April). *COVID-19 and human rights: We are all in this together*. https://www.un.org/victimsofterrorism/sites/www.un.org.victimsofterrorism/files/un_-_human_rights_and_covid_april_2020.pdf

Uyoata, U., & Sanni, K. B. (2016). The Nigerian child and youth development. In Etim N. E. U. (Ed.), *Child rearing practice and development of values in Nigeria* (pp. 85–86). Cle-print.

Victor, P. F., & Asuka, T. T. (2021). Adult Education for healthy democratic practices in political socialisation in Nigeria. *Niger Delta Journal of Education*, *13*(1), 4–7.

World Bank. (2022, March 22). *Nigeria poverty assessment 2022: A better future for all Nigerians.* https://www.worldbank.org/en/news/infographic/2022/03/21/afw-nigeria-poverty-assessment-2022-a-better-future-for-all-nigerians

TOWARDS A TRANSCULTURAL PERSPECTIVE ON MOTHERING AND LEARNING FROM CHINESE IMMIGRANT MOTHERS IN CANADA

Yidan Zhu[1]

ABSTRACT: Drawing on theories from transcultural theory, I examined Chinese immigrant mothers' transcultural perspectives on mothering and learning. Recent adult educational studies contain limited research on the effects of cultural influence on mothering and learning by immigrant mothers from their perspective. Based on 30 semi-structured interviews among Chinese immigrant mothers in Canada, this study revealed there are not only interactions between the fluid cultural values and the understanding of mothering and learning by immigrant mothers, but also race, gender, and class relations behind Chinese immigrant mothers' mothering and learning practice. This paper contributes to a better understanding of cultural influence on Chinese immigrant mothers' learning and mothering practice. The findings help foster adult educational programs for immigrant mothers in multicultural societies.

Keywords: transcultural perspectives, immigrant mothers, China, Canada

During the past decade, immigrant mothers' learning gradually became a significant phenomenon in North America (Zhu, 2017, 2020). A growing number of new immigrant mothers were enrolled in programs of settlement, language learning, and parenthood education. However, few studies have explored Asian immigrant mothers' learning practice at home or in the community in transcultural contexts. To fill this void, I examined Chinese immigrant mothers' transcultural learning practice in Canada. I particularly focused on the intersectionality of race, gender, and class in shaping Chinese immigrant mothers' informal learning in transcultural settings.

Limited research exists on the effects of cultural influence on mothering and learning by immigrant mothers from their perspective (e.g., Holloway & Pimlott-Wilson, 2014). Drawing on theories from transcultural theory (Guo & Maitra, 2017), I discuss Chinese immigrant mothers' transcultural perspectives on mothering and learning. First, the paper revisits concepts of mothering and learning from a transcultural perspective. Second, the paper provides data analysis of Chinese immigrant mothers in Canada and draws on findings from their mothering and learning practice. In this paper, I conclude a transcultural approach is necessary for examining immigration and refugee studies in adult education.

Theoretical Framework

This study adopts a transnational theoretical framework while aiming to propose a transcultural framework for promoting transformative learning in adult education. Based on that construction, immigrants' knowledge and skills are unrecognized and devalued (Guo, 2009). Immigrant mothers are usually imagined as "unprofessional" or "without any Canadian/local experience" (Zhu, 2020, p. 9). Unequal power

[1] Assistant Professor, Texas State University, San Marcos, TX, 78666. yidan.zhu@txstate.edu

relations exist between immigrant mothers' knowledge and the knowledge they need to learn in both formal and informal settings.

"Transnationality" has become an important framework for studying migration and mobility in the global world (Glick Schiller et al., 1992; Guo, 2013, 2016; Xiang et al., 2013). Since Glick Schiller et al. (1992) proposed "transnationalism" as a framework for studying migration, researchers have started to examine how migrants build social fields in which they link together their country of origin and their country of settlement. Scholarly debates in transnational migration studies concern the changing meaning of "home" (Levitt et al., 2011; Taylor, 2015), integration and assimilation across borders (Kasinitz et al., 2002; Waldinger, 2017), and connections between return migration and transnationalism (Guo, 2016; Xiang et al., 2013). This research offers new insights that compel researchers in adult education to reconsider the essential debate in the study of transnational migration—the concept of transculturation. Transculturation is not a new term; it is used in cultural studies and suggests a process through which "individuals and societies chang[e] themselves by integrating diverse cultural life-ways into dynamic new ones" (Guo & Maitra, 2017). Transculturation sees individual cultures as fluid and places them in constant interaction with other cultures (Guo & Maitra, 2017).

This study aims to propose a transcultural framework in adult education through exploring the changing meaning of mothering and immigrant mothers' non-linear, dynamic, mixed, and fluid culture and learning experiences. I argue the transcultural framework contributes to research on adult educational studies and preparation through three aspects: 1) re-examining mothering in the transcultural context; 2) developing a just and transformative learning curriculum in adult education; and, 3) proposing a transcultural framework for guiding future research on adult education.

Literature Review

Motherhood learning, as a form of adult learning, must be understood from the epistemological and ontological foundations of mothering and learning. Mothering is a practice; a definition from O'Reilly (2010) focuses on experience and practice of mothering as distinct and separate from the identity of mother. Expanding on O'Reilly, I treat mothering as a praxis that links the practice of mothering to ideology of mothering and mothers' knowledge production. Learning is socially organized by a set of ruling relations. *Ruling* relations refers to relations, as forms of consciousness and organization, that are objectified in the sense they are constituted externally to particular people and places (Smith, 2005). In immigrant mothers' learning, ruling ideas represent interests of the hegemonic dominant group or ruling class. Knowledge of mothering represents interests of the globalized regime of ruling that shapes immigrant mothers' learning, mothering, and everyday practice. Locating motherhood learning in a transcultural discourse, ruling ideas of mothering represent interests of the dominant ideas, while knowledge of mothering represents interests from the marginalized who produced unequal social relations.

Methodology

The data come from a two-year critical ethnographic study I undertook in a Vancouver-based immigration settlement organization that provided workshops and motherhood learning courses for new immigrants in Canada. Critical ethnography, which is different from traditional ethnography in emphasizing the social conditions of people's daily lives as "the foundation for inquiry," enables the examination of institutions, regime of knowledges, and social practices that limit choices, constrain meaning, and denigrate identities and communities (Madison, 2005, p. 5). Critical ethnography refers to the use of anthropological qualitative, participatory, and observational methodology (Masemann, 1982). In my fieldwork between 2015-2017, I conducted in-depth ethnographic interviews with 30 Chinese immigrant mothers in this immigration settlement organization in Canada. In the interview, I asked questions including how they understood mothering, how they practiced mothering in Canada, how they made work-life balance, and how they experienced cultural barriers in the host country.

Findings

Research findings indicate Chinese immigrant mothers' experiences as they encounter work-life balance issues, cultural barriers, and transnational family relationships are crucial to challenge post-colonial relations behind motherhood learning. This study found social, cultural, and political construction of good mothers in a Canadian context forces Asian immigrant mothers to learn mothering, which was constructed as advanced, Western, and scientific mothering knowledge. This finding is borne out by the fact immigrant mothers who learn to parent their children based on Western and scientific approaches consider themselves to be good mothers. Examining Chinese immigrant mothers' fluid identity and transnational experience in Canada could help challenge the hegemonic ideology of mothering.

Transcultural Perspectives on Mothering

In my interviews, I found Chinese immigrant mothers faced many challenges in terms of mothering and parenting. Participant "Lisa" said

> I think the biggest problem is that the first is really anxious. It is because this anxiety also comes from many aspects. The first problem is that sometimes I am always worried, because the children are trapped at home and there is nothing they can do. They used to have their own football team and played football, but now they dare not go. I feel that their behavior will change a little bit gradually, for example, if they don't like going out so much, they may not go. I always worry about this aspect. Then the third child, he is about 3 years old, in the development stage of language and social interaction, although I will also take him out for a walk, in a place with no one around. I usually take him to a church around here. He has almost no contact with people. I am very worried about this child. I feel that he has no

> contact with the outside world. I am always a little worried, because I can also feel that they are not doing things like before. Although I have online classes at home every day, I am not as happy as I used to be at school, and now I sometimes feel a little...how to say? It's just that they may be in a bad mood, and then we see that he doesn't work hard. Anyway, this is one of the anxiety (Interview data, interviewee 01).

Chinese immigrant mothers have anxiety in terms of communicating with the outside world. The mothers are trying hard to help their children and family communicate with people in their new living environment. At the same time, the mothers are shifting their parenting by focusing more on children's social skills and integrating into the local society. Furthermore, "Lisa" told me her relationship with her children has been changed during the COVID-19 pandemic. She said

> I feel that there are still some changes, although I don't live with my parents, a phone call or something should not have an impact. But I think there are still some changes in the relationship with children. Because of the current COVID-19, adults and children are a little anxious, so the relationship can sometimes be a little tense. For example, when the kids do things, we feel that they are not doing well, or that they are not serious. We will talk to them, and they will correct their behaviors, but they feel more nervous than before. In the past, because everyone went to school and went to work every day, there was not so much time to get along. The kids feel more nervous while stay with us together for such a long time…Sometimes I also reflect, I feel that sometimes I get angry with children and criticize them, and sometimes I also think, it is difficult for everyone, because I am indeed very anxious, and then sometimes they also notice that I'm very anxious. So, I think I need to be calm, and I can't get angry easily if something happens, I think that kind of mother may be the best for children. I try to lean in this direction, but I think I did not very good (Interview data, interviewee 01).

Due to different situations during the pandemic, participating immigrant mothers' parenting style and relationship with their children changed. They started reflecting on how to best parent their children and best assist their studies. However, from a transcultural perspective, immigrant mothers actually learned to control their emotions and try to be calm. They started using a reflective way of re-learning how to be mothers and parent their children.

Transcultural Perspectives on Learning

Participating Chinese immigrant mothers shared their learning experiences with me. For example, "Jamie," an immigrant mother in Calgary, Alberta, told me

> I bought a lot of books from China, books about parenting, because I felt that I needed to grow up. I think how to raise a child is really a big problem. It doesn't mean that you just do it casually. I think this is very irresponsible, and we are not aware of the impact of the original family on the child. Yes, in fact, it may be

> difficult to avoid most of the time, because people will make many decisions subconsciously, and it is difficult to change, but I think there are some things that can be changed. In fact, sometimes I still believe in learning good parenting methods, because I believe that the experiences and lessons that I have summarized will actually be more helpful to myself (Interview data, interviewee 08).

Based on Jamie's interview, I found most immigrant mothers take learning as a way of enhancing their parenting skills. Chinese immigrant mothers not only learn from local parents and teachers, but also from books, social media, and the internet. Specifically, they take opportunities of learning from Chinese books, social media, and different transnational parenting networks to increase their self-esteem; they become self-directed learners. From a transcultural perspective, mothering or parenting is no longer with a single cultural perspective; it is more mixed with different beliefs, values, and expectations. Participating Chinese immigrant mothers' learning experiences mixed both their own understanding of mothering and others' parenting/mothering practice to generate their own mothering practice.

Conclusion

This paper examined Chinese immigrant mothers' learning experience as an example to understand how motherhood learning is socially organized with transcultural relations. Aiming to decolonize motherhood learning, this study explored immigrant mothers' learning activities in a Canadian immigration settlement organization. Findings from this research suggest adult educational researchers and practitioners should pay more attention to transcultural aspects of mothering and learning to ensure they treat immigrant mothers as self-directed adult learners. This paper concludes examining Chinese immigrant mothers' experiences could help adult educators and researchers raise consciousness on immigrant mothers' ways of knowing and knowledge production in a transcultural era.

References

Glick Schiller, N., Basch, L., & Blanc-Szanton, C. (1992). Transnationalism: A new analytic framework for understanding migration. *Annals of the New Academy of Sciences, (645)*1, 1–24. https://doi.org/10.1111/j.1749-6632.1992.tb33484.x

Guo, S. (2009). Difference, deficiency, and devaulation: Tracing the roots of non-recognition of foreign credentials for immigrant professionals in Canada. *Canadian Journal for the Study of Adult Education, 22*(1), 37–52. https://cjsae.library.dal.ca/index.php/cjsae/article/view/1002

_____. (2013). *Transnational migration and lifelong learning: Global issues and perspectives.* Routledge.

_____. (Ed.) (2016). *Work, learning and transnational migration: Opportunities, challenges and debates.* Routledge.

Guo, S., & Maitra, S. (2017). Revisioning curriculum in the age of transnational mobility: Towards a transnational and transcultural framework. *Curriculum Inquiry, 47*(1), 80–91. https://doi.org/10.1080/03626784.2016.1254504

Holloway, S. L., & Pimlott-Wilson, H. (2014). "Any advice is welcome isn't it?": Neoliberal parenting education, local mothering cultures, and social class. *Environment and Planning A: Economy and Space, 46*(1), 94–111. https://doi.org/10.1068/a45457

Kasinitz, P., Mollenkopf, J., Waters, M. C., & Anih, M. (2002). Transnationalism and the children of immigrants in contemporary New York. In M. C. Waters & P. Levitt (Eds.), *The changing face of home: The transnational lives of the second generation* (pp. 96–122). Russell Sage Foundation.

Levitt, P., Lucken, K., & Barnett, M. B. (2011). Beyond home and return: Negotiating religious identity across time and space through the prism of the American experience. *Mobilities, 6*(4), 467–482. https://doi.org/10.1080/17450101.2011.603942

Madison, D. S. (2005). *Critical ethnography: Method, ethics, and performance*. Sage.

Masemann, V. L. (1982). Critical ethnography in the study of comparative education. *Comparative Education Review, 26*(1), 1–15. https://doi.org/10.1086/446259

O'Reilly, A. (Ed.). (2010). *Twenty-first-century motherhood: Experience, identity, policy, agency*. Columbia University Press.

Taylor, S. (2015). "Home is never fully achieved ... even when we are in it": Migration, belonging and social exclusion within Punjabi transnational mobility. *Mobilities, 10*(2), 193–210. https://doi.org/10.1080/17450101.2013.848606

Waldinger, R. (2017). *The cross-border connection*. Harvard University Press.

Xiang, B., Yeoh, B. S. A., & Toyota. M. (Eds.). (2013). *Return: Nationalizing transnational mobility in Asia*. Duke University Press.

Zhu, Y. (2017). *Practising ideology: Chinese immigrant mothers' learning in Canadian immigration settlement organizations* (Publication No. 106354660) [Doctoral dissertation, University of Toronto]. https://www.proquest.com/docview/2010571903

_____. (2020). Learning to become good mothers: Immigrant mothers as adult learners. *Adult Education Quarterly, 70*(4), 377–394. https://doi.org/10.1177/0741713620921179

CONFINTEA VII MARRAKECH FRAMEWORK FOR ACTION: HARNESSING THE TRANSFORMATIONAL POWER OF ADULT LEARNING AND EDUCATION

unesco
Institute for
Lifelong Learning

CONFINTEA VII Marrakech Framework for Action
Harnessing the transformational power of Adult Learning and Education

Preamble

1. We, the representatives of 142 Member States of UNESCO, and representatives of civil society organizations, social partners, United Nations agencies, intergovernmental agencies, youth and the private sector, have gathered in **Marrakech, Kingdom of Morocco,** and online, **from 15 to 17 June 2022**, as participants in the Seventh International Conference on Adult Education (CONFINTEA VII). The conference takes place during a pandemic that has profoundly impacted education systems worldwide, including adult learning and education (ALE).

2. We gather to take stock of important challenges and progress made in ALE since CONFINTEA VI in 2009, and to establish a roadmap for the advancement of ALE over the next 12 years – towards 2030 and beyond.

3. We recall the **achievements of CONFINTEA VI**, including recognition in the 2009 Belém Framework for Action (BFA) of ALE as an essential element of the right to education, and its identification of five areas of action for ALE which remain relevant today: policy; governance; financing; participation, inclusion and equity; and quality. We also emphasize the value of UNESCO's Global Report on Adult Learning and Education (GRALE) which, mandated by the BFA in 2009, has regularly monitored developments in ALE.

4. Supported by data from GRALE, we reflect on **major global efforts in promoting ALE and lifelong learning since 2009**. These include the commitment of the international community to the 2030 Agenda for Sustainable Development and its Sustainable Development Goals (SDGs), greater recognition by the international community of the need to promote lifelong learning, as exemplified by SDG 4 'to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all', the report of the International Commission on the Futures of Education, improved global ALE monitoring through the five GRALEs, the Global Education Monitoring (GEM) Report and other initiatives, including the Global Alliance for Literacy within the Framework of Lifelong Learning (GAL) and steps taken towards the integration of ALE in the global education agenda and architecture. A rights-based approach should therefore guide the implementation of the Marrakech Framework.

5. We underline the long-term structural impact of the **COVID-19 pandemic** and its contrasting effects on ALE. The pandemic has drawn additional attention to the need for governments and communities to develop and implement strategies for the acquisition of knowledge, skills and competencies and learning policies that support youth and adults to cope with the effects of this crisis. We also emphasize the need to build strategies for reskilling and upskilling, which are necessary to meet the changing needs of societies and the world of work brought about especially by the green and digital transitions.

6. We recall the **2030 Agenda for Sustainable Development**, adopted by the United Nations (UN) General Assembly in 2015, and are committed to achieving the 17 SDGs. We recognize that lifelong learning is critical to all 17 goals and that, as a core dimension of lifelong learning, ALE is key to their achievement. We especially reaffirm our commitment to SDG 4, through which Member States have committed to 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'. We recall the **Berlin Declaration on Education for Sustainable Development,** which reaffirms the importance of education for sustainable development, adopted in May 2021, and invite adult learners to help achieve its 16 recommendations. We also acknowledge the report from the International Commission on the Futures of Education (UNESCO, 2021), *Re-imagining our futures together: A new social contract for education,* which asserts the right to quality education throughout life and underlines the transformative power of education for building a sustainable future.

7. We strongly support the Commission's call to ensure "gender equality and the rights of all" in and through adult learning and education, recognizing that gender norms can affect learners' ability to engage effectively in education. Gender-transformative adult learning and education must be comprehensive, holistic and intergenerational, bringing together education actors with sectors such as health, protection and justice.

8. We uphold the **Recommendation on Adult Learning and Education (RALE)**, adopted by UNESCO's General Conference in 2015, including its definition of ALE[1] and identification of three key fields of learning: literacy and basic skills; continuing education and vocational skills; and liberal, popular and community education and citizenship skills.

[1] Adult education is a core component of lifelong learning. It comprises all forms of education and learning that aim to ensure that all youth and adults participate in their societies and the world of work. It denotes the entire body of learning processes, formal, non-formal and informal, whereby those regarded as adults by the society in which they live, develop and enrich their capabilities for living and working, both in their own interests and those of their communities, organizations and societies. Adult learning and education involve sustained activities and processes of acquiring, recognizing, exchanging, and adapting capabilities. Given that the boundaries of youth and adulthood are shifting in most cultures, in this text the term "adult" denotes all those who engage in adult learning and education, even if they have not reached the legal age of maturity'. (Recommendation on Adult Learning and Education, 2015, p. 6)

9. We reaffirm that **ALE is a key component of lifelong learning**[2], noting that ALE policies and practices apply to a wide range of ages, education levels, learning spaces and modalities, and recognizing that lifelong learning is the major engine of a learning society at different levels, involving individuals, families, organizations, workplaces, neighbourhoods, cities, and regions.

10. We strongly affirm education, including ALE, as a fundamental human right – a commitment which is critical in understanding and framing education as a public endeavour and a common good – as asserted by the International Commission on the Futures of Education.

11. We also recognize the continued, rich and diverse contributions of the international ALE community, including governmental and non-governmental stakeholders, for their contribution to the organization of CONFINTEA VII, including regional and sub-regional preparatory conferences, the outcome documents of which, alongside the BFA, the Suwon CONFINTEA VI mid-term review report, GRALE, RALE and UNESCO's Re-imagining our futures together report, have provided the basis for this framework for action.

12. At a time when societies are threatened by rising fanaticism and violent extremism, growing distrust in science and rising inequalities within and between countries, we reaffirm that ALE can constitute a powerful policy response to consolidate social cohesion, enhance socio-emotional skill development, secure peace, strengthen democracy, improve cultural understanding, eliminate all types of discrimination, and promote peaceful living together and active and global citizenship.

13. We commit to promoting the recommendations of this Marrakech Framework for Action as an integral part of the forthcoming Transforming Education Summit in September 2022. We recall the importance of this Framework, which will serve as a reference document for the Summit.

Principles and priority areas

14. Promoting ALE within a lifelong learning perspective: While recognizing that the priority areas of the Belém Framework for Action remain relevant, SDG 4 provides a unique opportunity to position ALE as a key component of lifelong learning, contributing to sustainable development and to the promise of peace that lies in UNESCO's constitution.

[2] 'In essence, lifelong learning is rooted in the integration of learning and living, covering learning activities for people of all ages (children, young people, adults and elderly, girls and boys, women and men) in all life-wide contexts (family, school, community, workplace and so on) and through a variety of modalities (formal, non-formal and informal) which together meet a wide range of learning needs and demands. Education systems which promote lifelong learning adopt a holistic and sector-wide approach involving all sub-sectors and levels to ensure the provision of learning opportunities for all individuals'.
(Education 2030 Framework for Action, UNESCO 2015, p. 30, footnote 5)

15. Building a new social contract: Inspired by the findings and proposals of Reimagining our futures together, ALE plays a key role in creating humanistic responses based on human rights, democratic societies, ethical principles, the mobilization of collective intelligence and an open dialogue informed by interdisciplinary knowledge.

16. In spite of remarkable progress during the past decades, including in women's literacy, many countries still struggle to reach adequate literacy levels, including digital literacy, and to bridge the considerable gender gap. In 2021, more than 770 million adults were lacking basic literacy skills, three out of five of whom were women (UIS). The benefits of literacy for individuals, families, communities, societies and the planet are well documented, and adult literacy must receive sufficient policy attention and financial support

17. Unlocking the potential of adult learning and education for climate action: Climate change represents a huge threat for humanity as well as for other species. It prompts us to question current production and consumption patterns, invent new industries and accept moral responsibility for future generations, recognizing that caring for the planet must become a global imperative. Hence, climate education must be mainstreamed in lifelong learning systems. ALE must be part of this green transformation. It gives youth and adults an understanding of the issue, raises their awareness and equips them with the knowledge and agency needed to adapt to and counter climate change, and develop resilience and agency for transformation. ALE can play an important role in empowering adult and older citizens so that they become role models for children and change agents at local, national and global levels. Community learning and citizenship education are key factors for sustainable development, including rural development, and to raise awareness of the impact of climate change. Furthermore, ALE institutions themselves can act as models for green transition in society by greening their curricula, facilities and management.

18. Promoting equal access of all learners, including older adults, to learning in digital environments: Technology is introducing important changes in the ways in which adults learn and are taught, as well as in the competencies and skills needed. It has become a powerful facilitator and a catalyst of individual learning. While technology can be a driver of progress in education, it can also create new barriers that make social or collective learning more challenging, widen existing social divides and create new ones. Equal access of all learners to learning in digital environments is a crucial prerequisite of dealing with these. This has implications for how adults engage as active members of society, and increases the importance of critical thinking, communication, empathy and social skills when navigating online environments to counteract mis- and disinformation. Building effective strategies, policies and instruments, bridging the digital divide, increasing access, addressing online power relations and preventing the abuse of technology are all critical in

establishing the transformative and emancipatory power of ALE. Effective digital pedagogies also require new models of teaching and learning in face-to-face, distance and blended formats.

19. Preparing adults for the future of work: Demographic shifts, the fourth industrial revolution, globalization and climate change are deeply transforming the economy and the labour market. These transformations have major implications for the nature of work, employment structures, the content of jobs, and the competencies and skills required. The linear education-to-work transition that was the dominant pattern for decades is becoming less relevant as, increasingly, adults follow complex trajectories over their working life. In this context, the task of ALE, through the shared responsibility of stakeholders, is to provide – in a flexible way – equitable acquisition of relevant knowledge, competencies and skills throughout the life course, including vocational guidance and other learning support to employment, decent work, career development and entrepreneurship. Demographic trends also indicate that the life expectancy of people across the globe continues to rise, contributing to the emergence of an ageing world. As, in an increasing number of countries, a large portion of the population will not be in work, the nature of ALE must be adapted, with more focus on preparing older adults for post-work activities, including to facilitate their continued meaningful contribution to societies and to place stronger emphasis on their well-being and enjoyment of all spheres of their lives. Moreover, the transformation of the economy required to achieve carbon neutrality and protect the environment will create an urgent need to reskill and upskill adults who are already in the labour market.

20. Creating a culture of lifelong learning: Lifelong learning will be key to addressing the challenges faced by humanity, from the climate crisis to technological and demographic change, in addition to those posed by the COVID-19 pandemic and the inequalities it has exacerbated. To achieve this, a holistic approach is needed, encompassing all types of ALE (formal, non-formal and informal), and all sectors and fields, various learning sites, including in-person as well as online and blended learning, and diverse learner groups. Thus, a learning environment needs to be created whereby inclusive and quality education and lifelong learning for young and old are established as a public endeavour that serves not only the world of work, but also individual wellbeing and the common good.

Action recommendations for transformative ALE

<u>Establishing frameworks and governance arrangements</u>

21. Recognizing the need for a renewed social contract for education, we invite UNESCO to initiate relevant expert consultations and intergovernmental dialogue on ways to strengthen the existing

human rights framework with regard to lifelong learning. This process should explore the most appropriate ways to translate the vision of a right to lifelong learning – with adult learning and education at its core - into reality, hence creating a culture of lifelong learning that is adapted to each Member State.

22. We recognize the value of multi-sectoral platforms to support the governance of ALE with all relevant and key actors, including in particular ministries, civil society organizations, youth, the private sector, universities and ALE providers. We also underline the importance of dialogue between workers and employers, and their organizational structures, which, in many countries, contributes to governance – particularly in terms of continuing professional development.

Redesigning systems for ALE

23. Recognizing the increasing diversity of ALE providers resulting from the emergence of complex learning ecosystems, we reiterate the need to strengthen the role of governments in establishing mechanisms and regulations and in allocating financial and human resources to support structures for ALE and to regulate, incentivize, stimulate, coordinate and monitor ALE as a public and common good within strengthened public education provision.

24. We recognize the importance of strengthening ALE at the local level, as a strategic dimension for planning, design and implementation for learning programmes, and for supporting and (co)funding training and learning initiatives such as community learning centres to be well-resourced with qualified adult educators. We recognize the diversity of learning spaces, such as those in technical and vocational education and training (TVET) and higher education institutions, libraries, museums, workplaces, public spaces, art and cultural institutions, sport and recreation, peer groups, families and others. This means reinforcing institutional capacities for promoting lifelong learning for all at the local level by, for example, encouraging learning city development, as well as fostering the involvement of local stakeholders, including learners, community groups and institutions.

25. Furthermore, in keeping with our commitment to creating flexible learning pathways within and between types of work, we underscore the importance of recognition of prior learning as well as the validation and accreditation of non-formal and informal learning, wherever appropriate and relevant, to include all sections of the population – particularly disadvantaged and underrepresented groups such as people with disabilities – into open and flexible learning eco-systems. In this regard, specific attention should also be given to including indigenous communities in all education and lifelong learning processes. Establishing flexible learning pathways is key to allowing mobility between different programmes, levels of studies and sectors of employment, and

for learners to choose their learning trajectories according to their talents and interests, taking advantage of the opening up of bridges across education sub-sectors and the labour market.

Ensuring quality of learning

26. We stress the key role of teachers and educators, including volunteer tutors and other professionals engaged in adult learning and education. We commit to implementing policies and strategies to upskill and further professionalize and specialize adult educators through pre-service, in-service and continuing training – in association with universities and research institutes – and by improving their working conditions, including their salaries, status and professional development trajectories. We further recognize ALE competency frameworks as strategic instruments for the professionalization of educators and the enhancement of their qualifications.

27. Emphasising the crucial role of face-to-face learning in ALE, we commit to promoting relevant, non-discriminatory and gender-responsive curricula and learning materials that will incorporate emerging fields of learning such as global citizenship education, education for sustainable development, education for health and well-being, socio-emotional skills, transversal and critical-thinking skills, and digital skills.

28. To enhance the quality of ALE, we highlight the importance of conducting research and evaluation to guide policies and practice to further promote inclusion, quality and relevance. This should include participatory research aimed at supporting ALE programme designers, teachers and participants.

Increasing funding

29. We commit to increasing public funding and resource mobilization for ALE and to preventing regression in existing budget allocations. As a component of lifelong learning, ALE should be funded through the contribution of a wide diversity of stakeholders, various ministries, employers and other private actors, local governments and learners. Such funding formulae should combine regular budgetary commitments with other sources and mechanisms, including blended financing and targeted measures for women and learners from vulnerable or marginalized groups. We are determined to increase public spending on adult education in accordance with country contexts aimed at progressively meeting the international benchmarks of an allocation of at least 4-6% of GDP and/or at least 15-20% of total public expenditure to education.[3]

[3] These commitments were already made at the World Education Forum in Incheon in 21 May 2015 and adopted by 184 UNESCO Member States on 4 November 2015 in Paris in a High-level Meeting.

30. Considering the role that international cooperation plays in reaching an appropriate level of funding for ALE, and bearing in mind the potential contribution of ALE to advancing all 17 SDGs, we call for a broadening of the scope of global mechanisms for financing development cooperation in education, so that they also support ALE. In line with the commitments we made to achieve SDG 4, we therefore call on existing global funds for education, specifically the Global Partnership for Education and Education Cannot Wait, to include ALE in the strategies, priorities and financial support they provide to their partner countries. We commit to work towards filling the funding gap to meet the SDG 4 adult literacy targets and to integrate skills training through the fulfilment of existing commitments related to official development assistance (ODA), including the commitments by many developed countries to achieve the target of 0.7 per cent of gross national product (GNP) for ODA to developing countries.[4]

Promoting inclusion

31. We commit to placing diversity, including linguistic diversity, inclusion, accessibility and equity at the heart of our endeavours, recognizing them as priorities in increasing access to ALE among marginalized or disadvantaged individuals, and under-represented and vulnerable groups and communities. It is also imperative that the objectives of equity and inclusion be particularly mindful of the realities of, and responsibilities toward, Indigenous peoples. This commitment derives from the reaffirmation of education as a human right, which includes the right to participation as an enabler of empowerment and of active and global citizenship.

32. We commit to significantly increasing participation in both non-formal and formal ALE programmes, and encourage countries to set ambitious benchmarks for the participation of diverse groups of learners. To include vulnerable populations and adults currently unreached, we commit to promoting outreach and guidance systems to raise awareness of learning opportunities, expand participation and enhance learner motivation.

33. We reaffirm the importance of implementing reliable, valid, transparent and accessible gender-sensitive information systems for ALE, allowing the tracking of progress in participation and learner retention with a focus on under-served populations, as well as of facilitating the exchange of knowledge between government and non-governmental institutions, academia, civil society and Member States.

[4] This commitment was already made as part of SDG17, target 17.2

Expanding learning domains

34. We reaffirm the vision of literacy as a continuum of learning and competency levels as a foundation for adult learning and education. We commit to strengthen considerably our efforts to implement related policies accordingly and to meeting the SDG 4.6 targets. This involves establishing comprehensive and evidence-based gender-transformative, cross-sectoral and inclusive literacy policies and implementation strategies.

35. We recognize the workplace as an important learning site. Establishing a culture of lifelong learning at work is important to help workers to secure and maintain decent work, adapt to new job requirements, and achieve personal development and fulfilment. We also recognize that workplace learning must contribute to building more inclusive and just societies. ALE promotes efficiency, productivity and well-being at work, and we call upon employers to invest in ALE in the workplace.

36. Recognizing the urgency and centrality of climate action for sustainability, we commit to promote education for sustainable development and to advance awareness on the causes and effects of climate change, so that all youth and adults can better understand urgent sustainable development issues and act as empowered citizens, by adapting their consumption patterns and lifestyles, and engaging actively in democratic debates and initiatives to protect and preserve the environment.

37. Recognizing the powerful role technology plays in ALE, Member States commit to identifying ways to reduce the digital gap and to promote digital literacy and skills, as well as to formulating new directions for learning alliances building on UNESCO normative instruments that frame access to knowledge (the 2019 Recommendation on Open Educational Resources and the 2021 Recommendation on Open Science) and the use of AI (the 2021 Recommendation on the Ethics of AI) for learning. Hence, alongside promoting blended learning – which is an effective means of reaching out to marginalized people and communities most in need of ALE – we will also promote open education resources for the common and public good, and address concerns over equity and inclusion, privacy and ethics in relation to the use of technology for learning.

38. Considering the impact of the COVID-19 pandemic, we assert the importance of learning for individual well-being and public health. We recognize the need to strengthen these dimensions in ALE policies and programmes at national and local level, harnessing the positive impact of ALE on health – including for older adults. Learning for health and well-being underlines the importance of connecting SDG 3 and SDG 4, and of mainstreaming ALE and health in multi-sectoral policies and programmes.

39. We further highlight the importance of active and global citizenship, and of media and information literacy, in tackling societal and development challenges. We therefore encourage initiatives to strengthen citizenship education for adults with the aim of developing learners' capacities to critically evaluate information, make informed decisions, develop agency, and contribute significantly to their local communities and public debate.

40. We commit to using the 2030 Agenda for Sustainable Development as a roadmap for the development of transversal skills, recognizing how this agenda brings cohesion and synergy to the multifaceted goals of ALE for the years to come. Quality education and lifelong learning are important mechanisms for implementing SDG 4 and are also prerequisites for poverty reduction (SDG 1), health and well-being (SDG 3), gender equality (SDG 5), reduced inequalities (SDG 10), gainful employment and decent jobs (SDG 8), inclusive, safe, resilient and sustainable cities (SDG 11), just, peaceful, inclusive, violence-free societies (SDG 16) and climate action (SDG 13). Furthermore, adult education is part of the right to education and crucial for the realization of all human rights.

International cooperation for enactment and monitoring

41. In enacting the commitments contained within this Framework for Action, and in order to continuously exchange knowledge and good practices, foster peer learning and contribute to institutional capacity development, and in a spirit of international solidarity, we commit to further support and engage in international co-operation initiatives aimed at improving ALE and promoting lifelong learning.

42. We commit to paying specific attention to the following categories of Member State, which are facing particular challenges in achieving SDG 4 and other SDGs:
    - conflict-affected Member States, considering their specific needs in terms of participation in ALE, including for refugees and displaced populations, and for capacity building;
    - Small Island Developing States (SIDS), considering their structural vulnerability, exacerbated by climate change;
    - African states, which face persistent education challenges and offer large opportunities for future development; and
    - Least Developed Countries (LDC), which continue to merit special attention and targeted support.

43. We invite UNESCO, as the lead United Nations agency for education, to support implementation of this Framework for Action in cooperation with Member States, ensuring periodic reviews of progress made.

44. We commit to taking this Framework for Action forward through relevant mechanisms at the global, regional, national, sub-national and local levels, drawing on the global architecture of SDG 4, which includes mechanisms and platforms such as the Global Report on Adult Learning and Education (GRALE), the Global Alliance to Monitor Learning (GAML), the Global Alliance for Literacy (GAL), the Global Education Monitoring report (GEMR), the SDG 4 Education 2030 High-Level Steering Committee, the High-level Political Forum on Sustainable Development, the work of international partners – including non-governmental organizations – and country-level monitoring. We welcome the creation of the African Institute for Lifelong Learning, an initiative of the Kingdom of Morocco.

45. In the tradition of GRALE, we reiterate the need for reliable, valid, transparent and accessible information and gender-sensitive monitoring systems that can both produce relevant and accurate disaggregated data for monitoring periodically the enactment of this Framework for Action, and support digital platforms to facilitate the exchange of knowledge and best practices between Member States and other key ALE constituencies.

46. We call on UNESCO to coordinate, through the UNESCO Institute for Lifelong Learning, a monitoring process at the global level to report periodically on progress in ALE, through dedicated instruments including a global report and a CONFINTEA VII mid-term review in 2028 to assess the progress made.

47. We also welcome the proposal of the Kingdom of Morocco to create a Post-CONFINTEA VII inter-ministerial commission, with a view to supporting the effective and participatory implementation of the recommendations of this Framework.

48. We therefore adopt the Marrakech Framework for Action to guide us in harnessing the transformational power of ALE within a lifelong learning perspective for a socially cohesive, fulfilling, inclusive and sustainable future for all.

SEVENTH INTERNATIONAL CONFERENCE ON ADULT EDUCATION

REPORT BY THE GENERAL RAPPORTEUR OF CONFINTEA VII

unesco

Royaume du Maroc

Ministère de l'Education Nationale,
du Préscolaire et des Sports

CONFINTEA VII

Seventh International Conference on Adult Education

15 to 17 June 2022

Marrakech, Morocco

Report by the General Rapporteur of CONFINTEA VII

Cecilia Palm, Secretary-general of Folkuniversitetet, Sweden

17 June 2022

Education 2030

Good afternoon, delegates and all conference participants.

I am honoured, as the General Rapporteur, to present my Oral Report of CONFINTEA VII - the seventh International Conference on Adult Education - held in Marrakech, Morocco from 15th to 17th June 2022 under the High Patronage of His Majesty King Mohammed VI.

Representatives from 142 Member States and Associate Member States, including 49 Ministers and Vice-Ministers, and over 1000 participants deliberated on the theme: "Adult learning and education for sustainable development – a transformative agenda''. We gathered in person in Marrakech and also online.

In the Opening Ceremony, Morocco announced a new African initiative to strengthen South-South coordination and cooperation in the field of adult learning and education and lifelong learning in the form of a proposed African Institute for Lifelong Learning.

Her Excellency President Sahle-Work Zewde of Ethiopia, Chair of the International Commission on the Futures of Education, called for a new social contract for education that can repair past injustices and shape more just and sustainable futures.

These were bold statements which set the tone for COFINTEA VII. In this report I will summarize some of the trends, opportunities and challenges – as well as policy measures – that we have discussed together over the last three days of this conference. Looking back, we can identify some overarching dimensions which provide a lens for analysing our exchanges and speak to the moment in which we find ourselves.

When the conference started, we were all aware of the shared challenges we face, including widening social inequalities, digitalization, and the climate crisis. These profoundly impact youth and adult learners as well as the futures of education.

In today's context, adult learning and education cannot only be reactive. It has to be transformed in order to transform society through the knowledges, skills and competences required for citizenship, social justice, employment and sustainability.

A new social contract for education must be built on two foundational principles, firstly education as a common good and secondly, the right to education throughout life.

Indeed, education is a common good that opens the door to other rights. For the common good, democratic and inclusive dialogue with all stakeholders is crucial. And for adult learning and education to be learner-centred, learners – including youth – must participate in shaping it, not only as beneficiaries.

We have reflected on expanding the understanding of the right to education to the right to education throughout life, based on principles of social, environmental and economic justice. In the future, adult learning and education must be more inclusive of different ways of knowing, including indigenous knowledges.

In the context of lifelong learning, every individual has a right to adult learning and education. Yet, more should be done to ensure that the most vulnerable and disadvantaged are able to exercise

their rights. Everyone has the right to pursue adult learning and education without any form of stigma or discouragement. No one should be left behind.

Regarding gender equality, there remain huge gaps even though educating women is a smart investment with intergenerational benefits. Adult learning and education must take account of gendered relationships between women and men in society. Programmes and policies must promote a holistic approach to education for women. Adult learning is instrumental to achieve gender equality and that is key for inclusive and transformative adult learning and education.

Dear delegates and participants, the detailed discussions in plenary and parallel sessions will be available in a written conference report in due course. For now, I will share a few highlights:

Citizenship education for active citizenship has been highlighted as a domain of adult learning and education we need to strengthen, particularly in response to global crises. It may involve updating our curricula to embed epistemic justice, human rights, critical thinking, democratic values, and other interpersonal values. In the presence of Ministers, the Fifth Global Report on Adult Learning and Education (GRALE 5) on the theme of citizenship education was launched. Citizenship education teaches respect for differences, critical thinking skills and awareness of our shared humanity, while reinforcing civic engagement – yet its potential has not been realised.

Literacy has been recognized as the foundation for lifelong learning as well as a lever for citizenship education deemed paramount for adult learning and education in response to global crises. We must reinvent the roles of adult educator and literacy practitioner. We discussed how we can expand notions of literacy, improve governance and policy for literacy, address funding challenges, and strengthen data and research.

The labour market is transforming, and this is likely to intensify in the years to come. We need to promote flexible lifelong learning pathways between education and work, to strengthen technical and vocational education and training, and to address youth and adults' demand for decent work. We found that there is the need to make skills systems work across all levels to serve local needs, and to provide career guidance. Our discussions also centred on improving systems of data collection and maximizing the possibilities that digital training offers, especially for vulnerable groups.

Addressing the challenges of digital environments, we looked at the roles of technology in adult learning and education and its potential, as well as concerns about equity and ways to overcome the digital divide and promote digital skills. Attention was also given to international normative instruments that frame access to knowledge, and the use of artificial intelligence (AI) and connectivity for learning, especially in relation to personalised learning. Open Educational Resources (OER) can help to foster a culture of lifelong learning.

Adult learning and education for climate action was perhaps the most prescient theme tied to a major global trend. We discussed the capacity for adult learning and education to respond to crises like climate change by fostering resilience. Comprehensive measures and targeted policies aimed at reducing youth and adults' vulnerability to climate change, as well as exploring ways of fostering skills and knowledge for resilience across societies, have been shared. In terms of resilience in the face of other types of crises, adult learning and education can improve and sustain health and well-being, particularly as Member States recover from the COVID-19 pandemic.

We have also seen how, around the world, there are some common spaces and spheres conducive to effective implementation of adult learning and education. The learning city has a unique role to play in increasing accessibility to learning opportunities and, within learning cities, community

involvement is key to sustainable lifelong learning. We heard how Community Learning Centres (CLCs) are key structures for adult learning and education, providing a hub and key entry point for quality learning for all age groups, though their success heavily relies on political will, effective governance and public funding. Libraries are in an ideal position to partner with a wide range of other ALE actors. They can and should take a more strategic leadership role to ensure lifelong learning opportunities for all.

The governance of adult learning and education, as for education and lifelong learning as a whole, faces the dual challenge of innovation to protect what is of most value and innovation to make progress. There is a need to foster interdisciplinary, intersectoral, inter-ministerial dialogue and ways of working. This is addressed in part by the UNESCO Institute for Lifelong Learning's new publication Making Lifelong Learning a Reality: A Handbook, which was launched at CONFINTEA VII. It provides guidelines for lifelong learning policy development and implementation in response to major sustainable development issues, including for the achievement of all 17 Sustainable Development Goals, particularly SDG 4.

If I can capture the essence of our exchanges in a few words,

CONFINTEA VII has underlined the urgency of forging a new social contract for education as the future cannot wait.

Adult learning and education, as an integral component of the right to education in a lifelong learning perspective, is an essential part of this collective public endeavour.

Adult learning and education should be situated within the wider context of lifelong learning. Integrated measures are needed to create a holistic system which values learning throughout life, and ensures youth and adults are part of the process.

We need education and learning for transformative actions today. CONFINTEA VII is a turning point for expanding perceptions of education in a lifelong perspective. This is the message that we must take forward to political leaders at the highest level – adult learning and education is an investment in people, planet and prosperity. It is integral to the 2030 Agenda for Sustainable Development and beyond.

Our deliberations are directly relevant to the Transforming Education Summit, to be convened by the United Nations Secretary General in September this year, and the pre-summit to be held in Paris from 28-30 June.

Through active participation in CONFINTEA VII, as well as the adoption of the Marrakech Framework for Action here today, the international adult learning and education community has signalled its desire to make lifelong learning a reality.

Thank you.

ICAE SPOTLIGHT REPORT FOR CONFINTEA VII

INTERNATIONAL COUNCIL FOR ADULT EDUCATION

ICAE Spotlight Report

for CONFINTEA VII

Belgrade, 2022

The ICAE Spotlight Report

for CONFINTEA VII (2022)

Adult Learning and Education - because the future cannot wait

Prepared and edited by Timothy Ireland,
with the contributions from the ICAE Executive Committee,
ICAE organisational members and partners

Belgrade, 2022

Table of Content

Crises such as (the COVID pandemic and climate emergency) not only illuminate the injustices of our world, they also shine a light into other possible worlds, they make everything around us bright and different futures thinkable, for a short while at least. (Paul Stanistreet, 02/05/2022)

Introduction

On the eve of yet another CONFINTEA, it is salutary to recall the origins of the International Council of Adult Education (ICAE). ICAE was gestated during the fourth CONFINTEA held in Tokyo, Japan, in 1972 and formally baptised and registered in 1973. The International Conferences were, according to UNESCO's formal procedures, interministerial meetings at which delegations appointed by national governments debated the futures of what was then called adult education. Whilst UNESCO elevated adult education to a government responsibility and endeavour, a brief historical review quickly reveals that adult education was, and continues to be a child of civil society reared and nurtured by a large spectrum of organisations including churches, universities, trade unions, political parties, social movements, community groups, professional associations etc. Civil society organisations, local community groups and social movements have been and continue to be at the fore, and the major providers of adult learning and community education. While the other providers (government, private sector) contribute to building individual capacities that contribute to a better future, civil society organisations, community organisations and social movements involved in ALE allow us not just to build our individual futures, but imagine, learn and contribute to achieving alternative futures.

On the whole, government statistics on adult education refer to formal, more institutionalised initiatives which either under-represent or simply do not represent those educational activities developed by civil society organisations particularly, but not exclusively, in the field of liberal, popular and community education and citizenship skills. The ICAE then was conceived as a counterpoint and complement to UNESCO in that it set out to represent the voice of civil society so often unheard and undervalued and to establish the right of these initiatives to public funding and support.

Whilst efforts have been made to make the Confintea processes more democratic, transparent and participative, the regional reports prepared for the VII CONFINTEA reveal a tendency to inform about governmental initiatives more than those organised by civil society. In many cases this is due to the lack of systems and mechanisms for collecting information and data on what are considered nonformal activities. This was further compounded by the decision to replace the standard national CONFINTEA reports by the questionnaires used for the GRALE reporting process, which contributed to create a different kind of dynamic regarding the circulation of information. Civil society was not granted access to contacts with focal points responsible for providing the information for GRALE and has not been able to access the information provided. Similarly, the CONFINTEA Consultative Committee was not granted access to the draft version of GRALE despite its requests. Hence the logic behind preparing a Spotlight Report is to shine light on those educational and learning activities which frequently remain in the penumbra but which at the same time express the joy of learning as well as the immense effort so many millions of young people, adults and older adults make to expand their knowledge of themselves and of the world in which they live.

The engagement of civil society, in all its rich diversity, has been the decisive factor in the creation of Education for All as a global movement, and a main force in supporting millions of young people and adults worldwide in achieving their right to education.

Despite this invaluable contribution, we witness retrograde tendencies in many countries - shrinking space for civil society, the rise of authoritarian regimes which weaken democratic processes, resulting in a restriction on the space for the voices of all people, especially the most marginalized. There are also fewer opportunities for broad-based dialogue on education and more limited involvement of civil society in government policy and planning processes.

Whilst acknowledging the role played by civil society in the development agenda and the critical importance of SDG 4 - Education 2030 – for the success of that Agenda, we recognise the many challenges which lie ahead and for which civil society will constitute an insubstitutable protagonist:

- innovative potential of civil society, especially its ability to design and implement innovative educational and learning practices, as well as its depth of experience in working with important often hard to reach sectors of society, including women, indigenous people; unemployed; those deprived of their liberty; people with disabilities, offering not only knowledge and skills, but also contributing to their own empowerment, thus shaping them as active and critically engaged citizens, give visibility to the invisible and supporting the most vulnerable;
- learning and working to address gender inequality will continue to be of crucial importance to ALE and to civil society and requires actively engaging with women, as well as individuals of different gender identities;
- the role of civil society as the 'critical friend' and social actor that can influence policy and help to hold government accountable and to monitor commitments;
- civil society as the partner with responsibility for a large part of the action-oriented learning, helping people in real work and life situations and crises, organising and learning as part of social movements around housing, water, sanitation, gender based violence, environment etc;
- the urgency of the current situation requires a transformative approach and not 'business as usual' – the role of civil society organisations dedicated to ALE is to challenge the rigid patterns, social structure, architecture of power and traditional relationships that harm individual and social development.

This Report begins by resuming those core values and principles which have come to guide ICAE's work over the past 50 years - values and principles which exist independent of the challenges which the Council has faced over the years. It then points to those fields in which ICAE considers it crucial to invest in order to guarantee adult learning and education of quality and social relevance for the learners. We look briefly at what have been the achievements and the principal difficulties over the last decade since CONFINTEA VI in 2009, before presenting brief profiles of the challenges faced and the recommendations outlined by civil society in each of ICAE's regions. These regions correspondent to the ICAE's organisational structure which differs from the geopolitical division used by UNESCO. Hence, we have reports from Africa, the Arab region, North America, the Caribbean, Latin America, Europe and Asia and the Pacific. We conclude with the **ICAE AND GLOBAL CIVIL SOCIETY MANIFESTO – 2022: Adult Learning and Education - because the future cannot wait**, which consolidates the common challenges present in the regional reports and recommendations concerning the future development of ALE. The Manifesto was presented, discussed and approved at the International Forum of Civil Society, held in Marrakesh on 14th June 2022. In line with the participatory and democratic spirit of ICAE, we propose that specific recommendations to be included in the Marrakech Framework for Action shall be debated and decided by the participants at the International Forum.

CORE VALUES AND PRINCIPLES

During the last two years, the ICAE has been called upon to contribute documents for the 5th GRALE and to the International Commission on the Futures of Education. The resulting documents were based on the collective efforts of the Executive Committee and many other contributors. The core values/principles upon which ICAE's understanding of ALE are founded were drawn from these two documents as well as the historical documentation of the Council.

- **Education as a fundamental human right, a common good and a collective endeavour**:
    - ALE advocates for education as a human right and builds on the broad principles that underpin human rights – inclusion and equity, cooperation, participation and solidarity, as well as collective responsibility and interconnectedness. It is governed by the following two foundational principles:
        - Assuring the right to quality education throughout life.
        - Strengthening education as a public and a common good.
    - ALE is a basic right that also protects the rights of all, contributes to civic and democratic education and motivates relevant local action.
    - It promotes citizenship education, especially democratic global citizenship education.
    - It protects and defends educators who help to raise awareness and teach about human rights in times of crisis to ensure that democratic values are safeguarded.
- **Learner centred**: ALE can only help adults and older people to meet the challenges of the dynamic changes in our local and global environments, in political, social, economic and cultural fields and to untangle and solve the problems they face across the different stages of their roles in life and work, if it places their learning needs at centre stage.
- **Participatory, inclusive and emancipatory**: only approaches that are genuinely participatory and inclusive - encompassing the diversity of groups (people of different age, race, ethnicity, religion, caste, HIV status, disability, gender, sexual orientation, poverty, migration and refugee status, area of work, and geographic location...), and which seek to question current paradigms, dominant social structures and global power relationships and to inspire transformation and innovative actions towards more distributive justice, can claim to be future-oriented.
- **Democratic:** ALE embraces empathy and solidarity whilst empowering people to challenge the power relationships, structural inequalities and financial interests behind the problems. It contributes to co-creating a vision of a society that values justice, solidarity and socio-ecological well-being – well-being understood not as a synonym for comfort, wealth and ownership, but as rooted in furthering personal growth and fulfilment, relationships of friendship and love and a sense of community.
- **Lifelong**: education throughout life is built upon inclusive and equitable quality learning opportunities and outcomes. This includes adult learning in all of its many creative manifestations, in work and life, formal, non-formal and informal. From the perspective of LLL, meaningful learning should not be construed as happening in schools alone or reduced to this period of the life-course. The power to decide and create change in our homes, in our communities, in our countries and in our planet, rests on the ability of adults to learn and work alongside our children and youth, recognising that adulthood is by far the longest period in the lives of the majority of humans. Learning is both a core characteristic of the life-course and an individual and communal development goal.

KEY STRUCTURAL COMPONENTS OF ALE

The successful implementation and expression of the core values and principles of ALE, requires the investment of human, financial and intellectual resources in the following key structural components of ALE:

- **Professionalization:**
    - strengthening the institutional structures (like community learning centres, for delivering ALE) and securing the role of ALE staff;
    - improving pre-service, in-service and continuing formation, further education, training, capacity building and employment conditions of adult educators;
    - developing appropriate content / curricula and modes of delivery adequate for adult learners, based on research results.
- **Physical and legal structure:**
    - Quality ALE can only be achieved on a large scale if and when it has adequate mechanisms of governance and support structures similar to other sub-sectors of schooling, vocational or higher education.
    - ALE requires its own regulations on policy, legislation, and finance to operate effectively and create and sustain opportunities for the education and learning of adults which cover all spheres of life and work.
- **Methodologies and materials:**
    - Whilst work and, increasingly, decent creative work, will remain an essential part of life, ALE will also be concerned with our collective needs for learning in order to live healthier, fuller and more emotionally, spiritually and intellectually satisfying lives. The spirit of ecological justice requires a new understanding of our roles as cohabitants, together with other multiple forms of life, of this planet earth together with responsibility for the use of its natural resources. Learning how to live together as members of local and global communities presents new challenges.
    - Creative, flexible, community, tailor-made approaches can capture learning needs of different target groups, together with the diverse forms, contents and methods of learning to attend to those needs.
    - The capacity of civil society to design and implement innovative educational and learning practices, and its experience in reaching marginalised sectors of society - including women, indigenous people, unemployed, people with disabilities, rural populations, people deprived of their liberty, and others – and in providing them with the knowledge and skills, which contribute to their formation as active and critically engaged citizens, gives visibility to the invisible and supports those who are most in need;
    - The urgency of the current crisis requires truly transformative approaches which challenge the rigid patterns and social structure, the architecture of power and traditional relationships that harm individual and social development.
    - New forms of active citizenship require new ways of community organizing, alternative forms of sustainable living and new sites and forms of learning. Innovative grassroots movements often prove to be more agile and effective than governments in addressing the symptoms of these complex problems. These alternative visions and movements inspire the co-creation of new learning environments, such as learning cities (and rebelling cities), learning territories and public spaces as the new sites for ALE.

- **Finance and other resources**
    - ALE is the least supported link in the overall lifelong learning chain. Much research confirms that ALE remains globally underfunded in many countries and receives less overall funding compared to other areas of education.
    - Although the diversification of funding is part of the solution and different funding models may be used in different sub-sectors of ALE, state funding remains one of the primary funding streams, consistent with the concept of education as a public good, especially when it comes to literacy and basic education of adults, and to ALE for deprived and marginalised groups.
- **Policies, strategies and planning**
    - Intersectoral policies are a prerequiste for ALE. Despite the complexity involved, governance at national, regional and global levels requires an intersectoral policy framework which provides guidelines related to education, qualification, training and learning for young people and adults in all those levels of government.
    - The potential of intersectorality as a major stimulus to the promotion of policy and action concerning LLL should be recognised, particularly in relation to policies focusing on individual holistic growth and development in all areas of life - family, community, work, leisure, etc.

FROM BELEM (2009) TO MARRAKECH (2022): A GLOBAL PERSPECTIVE

CONFINTEA VI took place in the wake of a financial crisis and a pandemic caused by the H1N1 virus and we have now come full circle with the Sars-CoV-2 pandemic and another financial crisis preceding CONFINTEA VII. Between these two poles we can point to four global movements which have steadily gained force over the intervening years with profound effects for education in general and adult education in particular. Despite the international agreements – the Paris Climate Agreement in December 2015 and COP26 in November 2021, and global agendas – the Sustainable Development Goals of 2015, the UN Decade of Education for Sustainable Development, the Education for All Initiative and the Millennium Development Goals, the climate crisis continues to deepen. According to the latest report from the United Nations Intergovernmental Panel on Climate Change [IPCC], half the world's population is 'highly vulnerable', with the risk of whole communities being erased and many others threatened with extinction. At the same time, as Paul Stanistreet writes "The climate emergency, and the "closing window" now left for humanity to act (Harvey 2022), is a signal, one we can scarcely ignore any more, that we are in the death throes of the era of Western industrial and technological advance. Yet, for all of this, the hope of something radically better still amounts to not much more than a few thin straws in the wind." Nothing threatens the future so inexorably as climate change. António Guterres' warning on 18th May was equally stark: "We must end fossil fuel pollution and accelerate the renewable energy transition, before we incinerate our only home." It is impossible to ignore the pedagogical dimension of this emergency which demands a reset on how we think about the relation between education, development, work and the future of humanity.

Closely related to the climate emergency is the global demographical movement with life expectancy growing and healthy ageing processes placing new demands on public services, including education as well as the issue of intergenerational connections and commitments generating new demands and tensions.

The digital revolution has advanced at a frightening speed. Discussions concerning a new inclusive understanding of education as a fundamental human right have pointed to the need to include access to the digital as a new dimension of this right given its importance for participating in education and for the exercise of citizenship. At the same time, the digital can be seen to have a double dichotomous potential: it can lead to a more individualised private kind of activity as clearly evidenced during the COVID pandemic whilst also having the potential to open new collective spaces for learning and exchange. It is worth taking note of António Nóvoa's warning that our problems are not so much technological as pedagogical.

Lastly, the fourth global movement intimately articulated with the advance of digital and other technologies including artificial intelligence points to a future in which an increasingly large proportion of the population will no longer find occupation in the labour market which will lead to a redefinition of work and its relation to 'free or leisure time.' After decades of ALE increasingly focused on preparation for work or reskilling the changing nature of the labour market suggests that the demand for that dimension of adult education which CSOs traditionally developed aimed at personal and cultural development and quality of life will grow significantly.

Data collected during the decade between Confinteas VI and VII suggest that ALE in all its expressions - as adult literacy, basic education and popular and community education, has not prospered. The reasons for this are multiple as Benavot (2018) suggests – the low priority given to ALE by Ministries of Education, diminishing donor support, the absence of sustained private investment, the weak data-reporting mechanisms and this despite the effort implicit in the elaboration of five Global Reports on Adult Learning and Education (GRALE).

During this twelve-year period, four GRALEs were produced with the fifth due to be launched during the Conference in Marrakesh. The first in 2009, aimed to gather data through 154 narrative national reports as the basis for meaningful discussions during CONFINTEA VI. GRALE 2, published in 2013, drew on data from 141 countries and had a thematic focus on literacy. GRALE 3 was published in 2016, shortly after the UNESCO General Conference adopted the Recommendation on Adult Learning and Education (UNESCO, 2016b). Based on a survey in which 139 countries participated, the report monitored the five BFA structural pillars as well as including a thematic focus on the impact of adult learning and education on health and well-being; employment and the labour market; and social, civic and community life. GRALE 4 took stock of achievements in the five key areas of policy, governance, funding, participation and quality and, in addition, focused on the issue of participation in adult learning and education making the case both for increasing and for widening participation. 157 Member States responded to GRALE 4. Whilst the GRALES clearly represent a significant advance compared with the total lack of monitoring instruments related to the previous Confintea processes, they continue to reveal the weakness of data-reporting mechanisms for ALE and particularly for the type of non-formal, popular or community educational activities promoted by CSOs.

Whereas the Hamburg Declaration on Adult Learning, approved at CONFINTEA V, established an Agenda for the Future, the Belem Framework for Action opted to reinforce the existing goals set out in the Millennium Development agenda and the Education for All Initiative and restricted itself to a set of recommendations and commitments. An analysis of the global reality of ALE points to a growing polarization between visions and practices of ALE in industrialized countries and in countries in the global south and emerging economies. In the first, what predominates is an instrumental interpretation of ALE in which emphasis is given to training, professional qualification and reskilling (where increasingly necessary) with a view to guaranteeing economic competitiveness. In countries from the Global South and emerging economies, activities tend to have as their focus compensatory and second chance schooling for young people and adults with an emphasis on the acquisition of literacy. The vision of lifelong learning promoted in Hamburg is frequently present in educational discourse but largely absent in practice.

In Suwon, at the CONFINTEA VI + 6 Midterm Review, the final report registered some timid progress with relation to the global situation in 2009 but went on to list a number of remaining challenges which included the lack of adequate ALE policies and legislation and the absence of basic coordination mechanisms at the national level. The issue of funding by governments and development partners remained critical with 42% of countries spending less than 1% of their education budgets on ALE as does the question of participation especially among women and vulnerable communities. The lack of funding contributes to difficulties surrounding the professionalization of the field with adequate initial, in-service and continuing training for all levels of staff. The gender gap and literacy also remain on the list of priority challenges with women making up three fifths of the global number of illiterate people.

The sum of the challenges and global trends facing humanity at present would suggest the critical relevance of ALE and the urgency of investing more in the field. Data collected for GRALE and other ends suggests that there is a classic mismatch between potential demand and the recognition of the importance of that demand. The four global movements sketched above related to climate change, demography, the digital revolution and work to which we can perhaps add migration and conflicts, wars and invasions can only be effectively faced by an adult population which has access to diverse forms of information, learning and education in manifold settings and formats and throughout their life span.

The majority of these challenges are in effect part and parcel of the Sustainable Development Agenda and whilst there is a broad understanding that many of the goals can only be achieved with the intervention of ALE, there is no reference to 'adult education' or 'adult learning and education' in any SDG4 target. This has led to a marginalisation of adult education and to the impression that ALE belongs to the past and LLL to the future.

This relative invisibility of ALE in the Sustainable Development Agenda is further complicated by the fact that just as the Belem Framework of Action opted for reinforcing the MDGs and EFA goals so it would appear that the tendency of the Marrakesh Framework of Action (MFA) will be to reinforce the SDGs. Whilst recognising the strategic relevance of the concept of lifelong learning as an overarching concept its dominance in the SDGs has tended to obscure and marginalise the vital role which ALE plays in servicing the learning needs of the adult population. In this sense the MFA needs to make explicit the strategic role which ALE will play if the SDGs are to be achieved by 2030. This underlines the importance of the We are ALE campaign which ICAE, with the support of DVV International, has launched and continues to propagate in order to clarify that whilst LLL expresses the spirit of the age, without concrete support for its constituent parts it is nothing. In this sense, the MFA needs to affirm the pivotal role played by ALE in making LLL a reality.

Education is generally considered as part of the solution for the multiple challenges facing humanity. Recently, however, education has become part of the problem to be solved. Nonetheless, as Benavot, Hoppers, Lockhart and Hinzen affirm, there is "Growing evidence (to suggest) that life on Earth hangs in the balance and ALE must be part of a comprehensive solution" (2022, p.7.). A recognition of the continued relevance of ALE and its multiple roles is to be found in the Reimagining our Futures Together report which conceives ALE as a means to help people:

> *find their way through a range of problems and increases competencies and agency. It enables people to take more responsibility for their future. Furthermore, it helps adults understand and critique changing paradigms and power relationships and take steps towards shaping a just and sustainable world. A futures orientation should define adult education, as much as education at all moments, as an education entangled with life. Adults are responsible for the world in which they live as well as the world of the future. Responsibility to the future cannot be simply passed on to the next generations. A shared ethic of intergenerational solidarity is needed (UNESCO 2021, p. 115).*

For civil society this constitutes an invitation, a challenge and a responsibility which cannot be declined.

REGIONAL SPOTLIGHT REPORTS

The complexity of the current global conjuncture and the limitations which the COVID pandemic has placed on the usual preparatory dynamic for the CONFINTEA resulted in the national reports, in 'normal' circumstances, presented at the regional conferences being replaced by reports prepared by national governments for GRALE V in which, in the large majority of the cases, CSOs had little opportunity to influence. All the regional consultations were held on line. In some, CSOs participated actively in decisions on the structure and contents of the programmes. The results of these regional consultations were condensed into reports of approximately 10 pages, in which by their very nature the quality and quantity of information, data and analysis is significantly less than previously. In general, the data and information provided focuses more on government actions than it does on civil society actions – the more non-formal, liberal, popular education dimension of ALE. This reduction of what could be described as a state of the art of ALE to the regional standardized profiles results in less transparency and less freedom of information with regard to ALE globally. This constitutes a further justification for civil society producing its own Spotlight report in order to attempt to shed light on developments in the field of ALE since the last Confintea, in Belém de Pará (Brazil), in 2009. As mentioned above, these regional profiles correspondent to the ICAE's organisational structure which differs from the geopolitical division used by UNESCO

1. Africa

Africa consists of 59 different countries with a total land area of 30 million km² (12 million square miles), making it the second largest continent in the world after Asia. This corresponds to a share of 20% of the habitable earth surface. The total population of the 59 countries is 1.34 billion, which represents 17.3% of the world's population and accounts for the fastest rate of population growth in the world. On the other hand, the continent accounts for around 2.8% of global economic output.

Whilst the region has experienced annual growth in GDP of between three and five percent it is important to remember that Africa is, traditionally, a more rural area, despite increasing urbanisation and migration from rural areas to larger cities. Migration between countries has also increased due to economic hardship and climate change, which in turn, has precipitated an increase in xenophobia.

The economic importance of African countries is low compared to other continents. In 2017, for example, per capita income in Africa was 43 per cent lower than in South Asia, compared to 12 per cent in 2000. When measured according to the human development index (HDI), strong inequalities remain between and within countries. The average income in the least industrialized continent is almost consistently at the lowest end of the scale in a global comparison. However, we need to recognise that an enormous proportion of the population is active in informal economies. This means that in the many agricultural regions, the inhabitants are self-sufficient and therefore the economic indicators developed by western industrial nations used for data collection and measuring 'progress' and 'well-being' may not capture the true essence of the African economy. It is estimated that 30% of the population of sub-Saharan Africa feed themselves completely and that a further 50% will cover at least large parts of their own needs through agriculture, livestock breeding and other ways that cannot be measured using traditional western economic indicators. This means that the countries' tax revenues and the resulting possibilities for financing infrastructure, education and health care are correspondingly low.

In broad terms, Africa continues to face rapid population growth, recurrent political instability and corruption, major security crises, food insecurity and hunger, inadequate health systems, unacceptable levels of violence, particularly related to women, the adverse impacts of climate change together with the COVID-19 pandemic and one of the lowest levels of vaccination globally. Despite this, since the early 2000s there has been a decline in infant mortality and an increase in school enrolment rates until at least the onset of the pandemic.

The negative impact of this accumulation of phenomena on ALE in the region is visible. While the adult illiteracy rate has decreased since CONFINTEA VI in 2009, this has been achieved at a much slower rate when compared to other parts of the world. In statistical terms, whilst the global literacy rate rose to 86 per cent in 2016 (UIS, 2017, p. 1), the overall literacy rate in Sub-Saharan Africa was an estimated 65 per cent (ibid., p. 7). 153 million of the world's population of 770 million illiterate young people and adults (aged fifteen and over), live in Africa of whom two thirds are women (World Bank, 2022).

Many countries on the continent are embarking on the Fourth Industrial Revolution with its associated digital technologies. However, poor energy infrastructure exacerbates an existing digital divide within and between countries on the continent and the rest of the world. Greater investment in training and the development of IT capacities is urgent.

This clearly suggests a **series of challenges** which ALE faces on the continent:

1. What kind of Africa do we want and what will be the role of ALE in this process? What kind of ALE do we need, to get to where we want to go?
2. Communities faces the triadic challenges of inequality, poverty and unemployment.
3. Young people are faced with huge challenges related to employment and unemployment, to migration and to adapting to new social, cultural, linguistic and economic contexts.
4. Corruption, terrorism, insecurity and political instability create backdrops which make the development of transformative education practice with young people and adults more complex.
5. Community food, health and energy systems need much greater attention.
6. The transition from a largely rural subsistence economy to that of a modern capitalist economy represents an enormous challenge.
7. The lack of priority given to ALE as clearly mirrored in educational budgets translates into difficulties in implementing national policies which civil society organisations can do little to compensate.
8. The strong focus on the formal economy and labour market needs rather than on community needs and interests weakens the very fabric of African society.
9. Great emphases are placed on the formalisation of adult education and the development of qualification-based programmes. This undermines the significance of non-formal adult education.
10. Civil society organisations could play an important role in adult education but have been weakened by poor support.

Based on the foregoing, the following **recommendations** emerged from the process of consultation:

1. In the general context of the Marrakech Framework of Action it is essential to include and emphasise the right to environmental justice.
2. Stable, adequate, specific and guaranteed funding as well as a collaborative approach between all adult education stakeholders (government and CSOs) is necessary for the development of ALE.
3. Many government departments provide some form of support to adult education due to the transdisciplinary nature of adult education. Innovative funding formulae based on the transdisciplinary nature of adult education should be created
4. Support should be provided to the multitude of life-making activities prevalent in communities and the educational responses necessary to strengthen them.
5. Encourage and support civil society organizations in the implementation of innovative programmes for adults and particularly the empowerment of women living in rural areas.
6. Learners' voices and participation should be an integral part of the decision-making process concerning the contents, format and delivery of ALE.
7. Citizenship education should be fully integrated into the basic framework of ALE by CSOs, researchers and educators.
8. Quality ALE can only be achieved by investing in building comprehensive adult education systems, based on a common understanding of adult education and the professionalization of those working in the field.

2. Arab Region

Although there is no globally accepted definition of the Arab region, all countries which are members of the Arab League are acknowledged as being part of the Arab world. The Arab League is composed of twenty-two countries inhabited by peoples of different ethnic, religious, and cultural backgrounds but sharing a common language. Classical Arabic is understood by most people and dominates written communication. With an estimated population of 439 million inhabitants, representing 5 per cent of the world's population (UNDP, 2020), the region occupied an area of 13,132,327 km^2 with a gross domestic product of $2.782 trillion (2018).

The region has undergone dramatic changes during the last decade since CONFINTEA VI in all aspects of life, due to political events and conflicts that have resulted in civil war in some countries. This has led to one of the most severe refugee and displaced persons crisis: over 40 per cent of the world's refugees and displaced people live in the region, with millions of Syrian, Iraqi, Yemeni and Libyan refugees and displaced persons requiring security, food, shelter, basic services including education, and employment.

In addition to the refugee and displaced persons crisis, the region faces a series of challenges represented by population growth, low quality of learning outcomes among graduates, high youth unemployment and the inability of the economy to generate the jobs that meet the region's employment needs. This is further complicated by the question of gender inequality. The Arab region has the lowest rate of female labour market participation in the world – 18.2 per cent compared to the global average of 47.5 per cent – (ILO, 2019). High rates of rural-urban migration and inadequate medical care are among the other challenges.

In the field of ALE, high illiteracy rates mean that literacy and basic skills are still the principle focus of adult education policies, legislation and formal and non-formal activities. Continued training, professional development and citizenship education remain low priorities. According to data from the UNESCO Institute for Statistics (UIS), the region's literacy rate increased from 65.29 per cent to 75.14 per cent between 2000 and 2019, and the youth literacy rate increased from 82.06 per cent to 86.16 per cent (UIS, 2020). Despite this qualified progress, literacy rates among adults and youth are still below the global averages of 86.48 per cent and 91.73 per cent, respectively.

As part of the follow up to the Belem Framework for Action, the Arab states adopted a regional statement known as the Sharm el-Sheikh Statement in 2015 to promote context-related adult education priorities. However, there is still a need to build a common vision and understanding of adult learning and education. Given the issue of immigration and refugees and the growing conflicts and wars in the region, ALE is no longer a priority for decision and policy makers in many countries of the region.

The attention of the majority of countries is focused on security and political challenges which has impacted negatively on funding for education and for other programmes which promote human rights and active citizenship.

In this context, the challenges for ALE are multiple. Funding for education in general and ALE is not sufficient and can be explained, at least in part, by severe financial and administrative corruption. At the same time in which ALE is marginalised or underestimated, it continues to be developed in a very traditional manner, using methods which lack creativity and innovation and focusing on a limited vision of literacy as the ability to read, write and understand basic mathematical functions. This is further complicated by the unavailability and lack of clear, specific and accurate data on education in general and ALE in particular. For civil society, the fragility of partnerships and networking with governments and the private sector, in the field of ALE imposes severe limitations on the development of alternative activities for which donor support is insufficient.

This situation gives rise to the following **recommendations** on the part of CSO:

1. The commitment by governments to establish specific funding for ALE to be developed in partnership with CSO and the private sector.
2. The need to devote special attention to the issue of immigrants and refugees, considering the growing conflicts and wars in the region.
3. Programme building should be based on participatory approaches which recognise the needs of learners and consider their specific cultural backgrounds and socioeconomic contexts.
4. Curriculum development as well as the tools and methods used to evaluate and monitor policy need to ensure effectiveness.
5. The quality of ALE will depend in good part on the training, qualification and continued professionalization of those in charge of ALE, including facilitators, teachers, supervisors, curriculum developers and those responsible for monitoring and evaluation.
6. To combat gender inequality and other forms of discrimination, ALE should seek to empower women/girls and other marginalized, disadvantaged and vulnerable groups, contributing to the quality of their lives and to their economic independence.
7. The concept of citizenship, linked to the concept of global citizenship and human and women's rights, should be included in ALE curricula and practices.
8. Continuing pressure is required on government policy makers and implementers to adopt and develop public policies supportive of ALE in the spirit of lifelong and life-wide learning and education.

3. Asia-Pacific Region

The Asia-Pacific Region is home to one third of the world's population, including more than 60 per cent of the world's youth, approximately 750 million young people aged 15 to 24. It is a highly diverse region regarding geography, population, politics, economics, wealth, ethnicities, languages and culture, and comprises five subregions: East Asia, Southeast Asia, South Asia, Central Asia and the Pacific.

By area, China is the largest country in the region followed by Australia, India, Indonesia, and Mongolia. The smallest country is Nauru, with an area of barely 21 km² (8 mi²). The region is also home to some of the world's most populous countries. China is the most populous nation in the Asia-Pacific region and the world, with about 1.44 billion people. India follows closely behind, with 1.39 billion. The third-most populous country in the region and the fourth-most populous in the world is Indonesia, with 276.3 million people. The smallest country by population is either Tuvalu or Nauru, whose projected populations vary depending upon the source consulted, but which always fall between 10,000-12,000 people.

> **East Asia** includes the People's Republic of China, Japan, Mongolia, and the Republic of Korea.
>
> **Southeast Asia** is composed of Brunei, Cambodia, Indonesia, Laos, Malaysia, Myanmar, the Philippines, Singapore, Thailand, Timor-Leste and Vietnam. It is one of the fastest-growing regions in the world, with a population of over 630 million
>
> **South Asia** comprises Afghanistan, Bangladesh, Bhutan, India, Nepal, Pakistan, Sri Lanka and the Maldives. Its total population of around 1.7 billion represents a quarter of the world's population. Furthermore, South Asia has the highest youth population in the world.
>
> The **Central Asia** region (CA) comprises the countries of Kazakhstan, Kyrgyz Republic, Tajikistan, Turkmenistan, and Uzbekistan.
>
> The **Pacific** is a subregion comprising seventeen nations, which vary in terms of size, geographical features and ethnic diversity: Australia, the Cook Islands, Micronesia, Fiji, Kiribati, Nauru, New Zealand, Niue, Palau, Papua New Guinea, the Marshall Islands, Samoa, the Solomon Islands, Tonga, Tuvalu, Vanuatu, New Caledonia and French Polynesia

According to the findings of the third Global Report on Adult Learning and Education (GRALE III), 456 million adults in the Asia-Pacific region are illiterate (UIL, 2016). However, there exists a huge disparity in the adult literacy rates reported across the region. This gap ranged from those in the nineties, such as 99.2% in Kyrgyzstan, 99% in Japan, 96.3% in Malaysia and Philippines, 95.8% in Vietnam and 92.3% in Sri Lanka, to 75.6% in Bangladesh, 58.0% in Nepal. The India and Pakistan reports registered an average literacy rate across their respective populations of 70% and 66%.

The reports elaborated for ASPBAE's Spotlight Report for GRALE 5 clearly pointed to the need to identify the disparities that these figures conceal for men and women and for rural and urban populations. For example, in Pakistan, literacy rates for men are higher than those for women. Literacy in the urban areas in Pakistan is also significantly better than in rural areas. In India, there is a high proportion of women among the non-literate population which suggests that even though the state has implemented several ALE programmes whose goal is to achieve higher rates of literacy, those policies have proven inadequate for addressing the gender barriers in education.

The findings in the Indonesia report are similar. Despite the range of initiatives aimed at achieving gender equality, deep-seated gender disparities can be identified as the main reason the female illiteracy rate remains high. The majority of low-income families, for example, tend to prioritize their sons' education over that of their daughters. Women then have fewer opportunities and less accessibility

to education; as a result, their opportunities to participate in the workforce are smaller as are their incomes.

Funding for ALE remains a huge challenge. Adult education and lifelong learning are considered as an integral component for achieving the Sustainable Development Goals (SDGs). However, reports from the region prove that ALE remains on the periphery of the priorities in terms of national budget allocation resulting in diminishing financial allocations over time. Despite the significant initiatives and progress in some countries, in general funding for ALE remains inadequate and coverage insufficient for the marginalized, particularly in countries such as Bangladesh, India, Indonesia, Kyrgyzstan, Nepal, Pakistan, Philippines, Sri Lanka, and Vietnam.

Education related challenges were exacerbated further by the pandemic, due to lack of infrastructure (internet, radio, television, and mobile phone) and insufficient funding. Campus closure and movement restriction led to the adoption of alternative strategies to continue the learning process. Whilst individual country reports present their own strategies and initiatives for citizenship education, it is clear that CSOs played a vital role in strengthening the initiatives which contribute to achieving the SDGs. Citizenship education emphasizes the responsibilities (duties and obligations) of family and society, for peace and conflict management, for the pursuit of social transformation and social emancipation, and for the recognition of human rights. Access to basic facilities, protection of the environment, disaster preparedness, and psychological and legal support are also included in the recognition of equal rights of the masses.

Recommendations

1. **ALE policy and financing for the continued delivery of ALE:** Governments and education policymakers should develop and implement gender-responsive, comprehensive and robust policies that promote ALE within an LLL framework; define concrete, gender-responsive budget plans; and lay down clear targets for ALE programmes.
2. **Equitable focus on vulnerable/disadvantaged youth and adults across countries:** ALE budgets and programmes should be allocated equitably and target the most disadvantaged populations, e.g., women, migrants, refugees, older people, people with disabilities, those living in poverty, the unemployed, ethnic minorities, stateless people, etc.
3. **Support for disadvantaged youth and adults through digital literacy initiatives** that mitigate the digital divide and complement existing low-tech and no-tech learning programmes.
4. **Provision of diversified content for learners** with diverse needs through blended approaches combining ICT and face to face learning, provision of multilingual ALE and capacity building on the changing role of ALE facilitators and providers.
5. **Promotion of global citizenship education (GCED)** and education for sustainable development (ESD) for youth and adults through ALE addressing urgent issues in the region such as climate change, conflicts and extremism.
6. **Establishment of NQFs for RVA:** Countries should establish a system to recognize the various ALE programmes offered by CSOs, which cater primarily for marginalized communities. This in turn will enable learners who complete an ALE programme offered by a CSO to receive accreditation for the knowledge and competencies that they have acquired, thereby enabling them to seek decent work and/or engage in further learning.
7. **Promotion of youth and adult participation in ALE programmes:** CLCs can serve as a platform to reach people, co-design education programmes and motivate them to participate in ALE.

8. **Establishment of effective stakeholder partnerships and collaborations for the promotion of ALE:** ALE has long been overlooked and underfunded by public bodies; for ALE to develop further, it now needs effective partnerships and institutionalised collaborations with CSOs at both the community and the national levels.
9. **Effective, evidence-based advocacy for the promotion of ALE:** The establishment of effective ALE policies, funding mechanisms and programmes calls for strong government commitment to advocacy, which in turn requires the collection, analysis and disaggregation of high-quality empirical data.
10. **International cooperation and development partners must increase Official Development Aid (ODA)** for ALE towards helping least developed countries and low-middle income countries in achieving universal literacy, especially accelerating cooperation for women's literacy and education on specific themes such as skills education for decent work and digital literacy for marginalised youth and women, citizenship and environmental and climate literacy.

4. The Caribbean

The Caribbean Community comprises about 19 million people across 19 member states many of which have emerged from massive political domination to independence and self-governance. The region reports an annual GDP of approximately 89,173M. The four official languages of the CARICOM are Dutch, English, French and Spanish.

The Caribbean region faces challenges of different orders related to the size of the economy, the geographical location of the island communities, their historical colonial past and the lack of defined adult education policies or strategic plans. Educational statistics reveal a literacy rate of 87%.

In the field of ALE, the region shares many common challenges with other regions of the world especially as a result of the ongoing pandemic. Adults within the region will need help to navigate and adapt to an uncertain future and to be resilient. This will undoubtedly require new sets of health, economic, social, industrial and educational policies.

Many countries in the region have identified crime, violence and corruption as a major deterrent to the economic growth and prosperity of their nations. Adult education with a focus on Peace education has a role to play in addressing this issue.

Whereas there is evidence that some effort has been made within the region towards identifying and articulating different pathways for learning much more needs to be done to enable adult learners to gain access to higher levels of learning. This also includes the need to create a link between non-formal and formal education.

More needs to be done in terms of the recognition and validation of non-formal learning across the region since a considerable proportion of adult education provision is supplied by civil society groups, non-governmental organizations (NGOs) and community-based organizations (CBOs).

Teacher quality and opportunities for professional development continue to be an issue within the region. In several countries there is a large number of untrained teachers and teacher training is in-service based meaning that teachers are not trained before they start teaching. The notion that anyone can teach in adult education contexts is prevalent. This is further exacerbated by an inadequate number of teachers. Adult education teachers are very often volunteers rather than professionals. Teachers need to be trained and certified.

Structures and systems to enable strategic adult education interventions are lacking in many countries in the region. Consequently, the capacity to manage, monitor and evaluate adult education intervention is very low if not absent.

This all points to a major policy gap in the region:

- A survey of thirteen countries within the Caribbean revealed that none of the countries had articulated an adult education policy or strategic plan. Rather, adult education is subsumed as a subsection in the educational policy of some countries.
- Mechanisms for the delivery of adult education are frequently ad hoc and offered by diverse entities - public (attached to some college), private, non-governmental organization and many churches at the community level.

Based on the foregoing analysis, three principle **Recommendations** are put forward in order to strengthen and qualify ALE in the Caribbean region:

- Policy positioning, provision and delivery mechanisms are critical issues which will need to be addressed as we must reposition adult education in response to the COVID -19 pandemic.
- Prior learning assessment and recognition (PLAR) should be explicitly identified as an essential tool that complements the recognition, validation and accreditation (RVA) of non-formal learning and thus links non-formal ALE to the formal system. In so doing, institutions of higher learning will be alerted to the need to expand their systems to integrate a broader section of the population in continued higher education to enable them to fulfil their goals and desires. This is essential if SDG4 is to be achieved.
- The situation outlined above clearly requires great attention to be given to an improvement in the quantity and quality of adult education teachers and in the provision of initial and continuing training as well as the necessary salaries and conditions of work.

5. Europe

Like other regions, Europe has faced testing challenges over the last decade. Demographic shifts, the fourth industrial revolution, globalization and climate change are deeply transforming the economy and the labour market. These transformations have major implications for the nature of work, employment structures, the content of jobs and the skills needed. At the same time, the region has faced a growing influx of migrants from Asia and Africa.

In 2015, 118.7 million people, or 23.7 per cent of the population of the European Union (EU), were reported to be at risk of poverty or social exclusion and tendencies of xenophobia, nationalism and extremisms increasingly posed an additional challenge in many countries in this region.

Overall, around one in five adults in the EU has not completed upper secondary education; close to seventy million adults lack basic reading and writing skills; 40 per cent of adults aged 25–64 have low levels of digital skills; and around one per cent has no digital skills at all.

Clearly the COVID pandemic has had a strong impact on ALE. 2020 and 2021 were years of rapid adaptation. The long foreseen but slow move into digital learning was suddenly accelerated to ensure the provision of learning in the first place. The pandemic led many organisations to apply changes to their work programs and acquaint learners with new types of learning formats.

The drastic change revealed the lack of digital infrastructure and skills across Europe and once again demonstrated that many adults are missing basic and life skills. While health literacy and critical thinking became a priority during the crisis, many adults were educationally alienated by a lack of financial means or competing priorities, especially those from a lower socio-economic background, the unemployed, low skilled and minority groups. Evidence shows that outreach and access have been dramatically complicated by the crisis.

ALE is predominantly understood as a public good and a collective endeavour for which the state is the duty bearer as part of a public service rationale. ALE is further seen as a systematic, consensual and regulated workplace practice, and as a collective endeavour at the civil society level that contributes to consensus-building, social cohesion and the maintenance of democratic institutions. Most states recognize non-formal ALE as both a collective and an individual project that builds bridges between culturally diverse people and enhances social capital. However, the degree of involvement of civil society varies from country to country. There is no visible trend in terms of heightened involvement of civil society or new opportunities for involvement during the COVID pandemic. In some cases, governments consulted civil society groups in their emergency response plans, preparing the way for more recognition and hence, funding. Many organisations would recommend their government to establish closer ties with civil society. Nevertheless, the pandemic has remained an overarching topic across countries, as it forced some adult learning and education providers to close their doors, but also enabled others to accelerate their transition to digital learning.

Challenges

Emerging key priorities and challenges in Europe relate to areas such as health and well-being, the digital transition, migration, and the development of future oriented skills related to the world of work. If people are to deal successfully with social and climate change on a global scale, they must first be able to situate their own lives in a global context. To address this issue in general, and to mitigate the effects of the COVID-19 pandemic in particular, governments in Europe have developed national strategies: however, whilst the policy response to the COVID-19 pandemic had led to more funding for ALE in some countries, in others recovery strategies tended to target predominantly the labour market, leaving out liberal adult education. It is important to add that in many European countries the involvement of ALE in the implementation of the Sustainable Development Goals (SDG) remains fragmented.

Civil society organisations across Europe have reported cuts in funding and depicted the financial difficulties faced by many learners, due to the COVID-19 crisis. In some cases, organisations had to terminate employment contracts of their staff or completely close their provision. Emergency funds were only available in some cases and mainly directed at employment-directed training courses, leaving the non-formal learning sector behind. One major obstacle to financing is the lack of recognition of non-formal adult learning. Subsequently, validation schemes are perceived as an opportunity not only to support the sector financially, but also to increase participation and access for those with competing priorities.

For the European Association for the Education of Adults (EAEA), Adult education helps change lives and transform societies – it is a human right and common good. For this reason, it believes that adult learning and education need to be strengthened at the European level.

This rationale is founded on the following understanding of ALE:

- Adult education is a common and public good and transforms lives and societies.
- Everyone should have the right and opportunity to access high-quality adult education.
- Anyone can learn irrespective of age and background.
- Participation of all learners and especially those with low basic skills is encouraged.
- A key task for adult education is to reach out to disadvantaged learners in order to combat the 'Matthew' effect.
- The learner is at the centre of the development, methodology, process and outcomes of learning offers.
- Empowering non-formal methods and methodologies apply the creativity, existing knowledge and skills of learners and provide inspiring learning experiences.
- Professional trainers, teachers and staff are necessary for applying the appropriate methods and achieving high-quality provision and a successful learner experience.
- Capacity-building and innovation in adult education organisations are necessary to adapt and anticipate changes in learning, teaching and learners' needs, but also societal and economic development.
- Cooperation (regional, European, global and institutional) is crucial for the visibility of adult education but also for peer-learning and innovation transfer.

Recommendations

1. Equitable access to ALE throughout life is a condition for integration and socio-economic development. Updating and enriching one's knowledge and skills are requirements of a knowledge society. Particularly, the threat of climate change forces us to question economic models, invent new industries and acknowledge the moral responsibility of today's societies to future generations, recognizing that caring for the planet has become a global imperative.
2. Promote inclusion of the learner as a key stakeholder and prioritize the learner's perspective.
3. Strengthen recognition of the full range and quality of ALE provision and its wider benefits, beyond purely economic benefits.
4. The development and implementation of future-oriented programmes and activities that promote inclusive and active participation throughout life.
5. Holistic learning ecosystems thus demand that we view ALE through the prism of lifelong learning as a continuum of connected experiences that are personalized, based on data, and delivered across various locations, media, and periods of time, involving both self-directed processes and collective activities.
6. Create inter-ministerial and intersectoral national entities to coordinate ALE, through connecting existing entities, with the involvement of a broad range of stakeholders, in order to foster mutual learning and social dialogue through partnerships and alliances across all sectors.
7. Develop adult educators' and staff capacities through high-quality pre- and in-service training, in particular for those working with disadvantaged groups.
8. Facilitate exchange among/between associations/organizations and peer-learning among countries.

6. Latin America

Situation

The Latin America Region is profoundly heterogeneous, and intensely rich in linguistic, cultural, ethnic and geographical diversity. It is composed of 20 countries and 14 dependent territories in which more than 600 languages are spoken, with a total population of 652 million people (less than 10 percent of the World Population - UN) including an indigenous population estimated at around 44.8 million, organized in over 400 ethnic groups. In addition, there exists an important afro-descendent population of over 134 million persons (ECLAC, 2015) concentrated in Brazil, Colombia, Venezuela and Ecuador. At the same time, according to the OECD, the development traps identified included low productivity associated with an economic structure centred on the primary and extractive sectors. A year after the onset of COVID-19, the United Nations Development Programme (UNDP) published a regional human development report, 'Trapped: High Inequality and Low Growth in Latin America and the Caribbean', confirming this trend and identifying LAC as one of the most unequal and slowest growing regions in the world (UNDP, 2021).

Challenges

The region's drama is its incapacity to develop productive policies that will generate human and food security as well as integration to an employment structure that generates increased welfare and well-being for the population. Its structural dependence on the export market (the logic of commodities) makes its economy highly vulnerable to global crises. The recessive cycles of the global economy prevent countries from effectively maintaining social protection systems and implementing childhood development and education policies. Politically, the existence of democratic regimes with varying levels of legitimacy and citizen participation stands out. Nevertheless, it is important to register the presence of regimes, which have systematically erased the social achievements of the so-called progressive governments, which preceded them.

The diverse socioeconomic, ethnic and cultural contexts of the region pose a broad set of challenges to literacy and other forms of learning for young people and adults in an educational context in which there are 35 million adult illiterates and 88 million who have not completed primary education. Evidence strongly suggests that limited access to schooling is broadly linked to structural poverty, as are unemployment, health care, social exclusion, migration, violence, the disparities between men and women. Seen through the lens of the Belem Framework for Action, and in the light of the more recent Sustainable Development Goals, adult learning and education faces a series of challenges with regard to coverage, gender, ethnicity, quality and participation.

Recommendations

It is important to clarify that the following recommendations are the result of the systematization of a series of debates, regional meetings and open working groups conducted with the broad participation of educators, students and representatives of social organizations in the region organized by the Platform of Regional Networks for Youth and Adult Education in Latin America towards CONFINTEA VII, composed of ALER, CEAAL, CLADE, Fe y Alegria, ICAE and REPEM. The Platform was formed during the period prior to the Regional Consultation in July 2021 as a strategy to strengthen the voice of civil society organizations both during and after the mobilization process for CONFINTEA.

i. The meaning of Youth and Adult Education in current times

Youth and Adult Education (Y&AE) should promote citizenship and popular education, which is in/of/ for life, transformative, oriented to the protection of health, decent work, food security, welfare, and the production, appropriation and use of knowledge by the population. It should be in harmony with nature, anti-patriarchal, decolonizing and anti-racist, based on solidarity, dialogue, respect for diversity, and contribute to the construction of a just and democratic society, with the full exercise of rights by all.

ii. Y&AE as a fundamental right throughout life

Y&AE is a fundamental, lifelong and life-deep, demandable, inalienable, indivisible and self-determined human right which should respond to changing contexts and diverse expectations, with alternative modalities, from literacy to postgraduate training, where universities take an active part. Y&AE is a catalyst for the entire range of human rights, gender equality and the entire 2030 Agenda.

iii. Institutionality and new democratic management for Y&AE

Y&AE requires a new institutional framework - the comprehensive management of education systems in countries with a diversity of learning spaces beyond the school, in formal and non-formal spaces. It requires intersectoral public policies and inter-ministerial coordination, in alliance with international organizations, local government, social movements and civil society.

iv. Public and fair funding for Y&AE

Y&AE requires that States guarantee domestic and public funding for Y&AE, dedicating sufficient and protected resources to this educational modality. Solidarity-based international cooperation is also necessary and welcome.

v. Inclusion and diversities in Y&AE

Y&AE should be inclusive and guarantee the right of all people to an education, which satisfies their educational needs in accordance with their diversities and realities. It should contribute to overcoming the educational disadvantages of all learners giving particular attention to the vulnerable and those suffering all forms of discrimination.

vi. Intracultural, intercultural, and quality Y&AE

Y&AE should be intracultural, intercultural and community oriented, valuing and strengthening the identities, cosmovision, knowledge and wisdom of Indigenous peoples and Afro-descendant communities, as well as the interrelation and coexistence with other cultures on equal terms, within the framework of epistemic justice and inter-science dialogue.

vii. Productive and technical Y&AE

Y&AE should be productive, technical, territorial and diversified, oriented towards material and intellectual production, to creative and imaginative work, in a harmonious relationship with nature and life systems. Likewise, it should be flexible and adaptable allowing learners to reconcile educational processes with other work and family activities.

viii. Y&AE and the right to ICT

The right to ICTs and to universal and free connectivity is fundamental, adapted to popular education methodologies and overcoming its instrumental use and the overvaluation of virtual education with respect to face-to-face education. Online education must be understood as complementary to face-to-face processes and as a factor of enrichment for individual and collective learning.

ix. Recognition and training of educators

Decent working conditions, fair salaries, professionalization and career plans are essential for Y&AE educators. Training should educate for critical citizenship, integrating the ethics of personal care with care for others and for nature, based on concepts of common good and Good Living.

x. Data production, follow-up, monitoring and evaluation for Y&AE.

The production of disaggregated data and comprehensive and reliable diagnoses, in addition to qualitative information is vital as is information on financing and investment. To this end, research, the systematization of experiences and evaluation are all essential.

7. North America

Situation

Both the USA and Canada place primary responsibility for ALE with the states and provinces. This decentralized approach has many benefits, but also creates barriers to collaboration, collective advocacy, and resource sharing. Recent political, economic and cultural turmoil, although mild by global standards, distracts attention from efforts to develop a more integrated, accessible, research-informed system of lifelong learning. Canada is an active UNESCO member state and there is hope that the US will soon return to participate more effectually in discussions about the role of ALE In addressing urgent, even existential, regional and global problems.

Challenges

Within the North American ALE community there is a feeling that the field is at a crossroads with a dependency on technology and connectivity being crucial for service delivery but at the same time a lack of clear policy and programme coherence.

There is, however, a need to stop looking at domains and policy areas and concentrate instead on the learner as the primary unit of interest, summed up in the notion of coalescing around learners' interests. Linked to this and to the issue of adult participation in learning, is the need to understand the barriers to that participation - inadequate social welfare policy to provide reliable access to childcare, health care, housing, and transportation to take part in learning activities.

At present there is an over emphasis on vocational training as a means to economic self-sufficiency and overall well-being combined with insufficient recognition of the value of lifelong learning for community and personal growth. This has resulted in many adult education programmes focusing on employability.

Greater conceptual clarity is still required with regard to lifelong learning and to other related concepts as a means of creating a common understanding and a greater feeling of unity which will also strengthen the demands for financial support.

Another of the major challenges for ALE relates to funding. If we are to broaden our understanding and practice of lifelong learning it is essential to create sustainable funding for partnerships between elite providers and other community organizations.

Key trends and issues

It is possible to identify a range of common key trends and issues which characterise ALE in North America. On the one hand, there is the issue of seeking to strengthen partnerships between ALE providers and community organizations and, thereby, helping individuals with other problems like food security, affordable housing, etc. On the other, as mentioned above in the challenges, the need for common terminology becomes more pressing. This could perhaps begin with definitions of terms so that examples/practices can be understood in the context of the definitions.

There is general recognition that despite the efforts of the last decade, more extensive, systematic data collection, research and analysis is needed in both the U.S. and Canada. This is fundamental for the formulation of policy and to strengthen arguments for more adequate funding.

Unlike some other regions, there is a very vibrant corporate structure in North America which helps raise awareness of the importance of lifelong learning and adult education.

There is little doubt that one of the principal issues continues to be how to support the continuing development of practitioners – the professionalization of those engaged in the field of ALE. What is the best way to engage with 'educators' working with learners, in order to improve their practice and what types of information and guidance concerning resources do they need as part of the process of professionalization?

Finally, the shift to the digital - to distance or remote learning – raises the issue of the absence of specific training for instructors and learners. What should be done to remedy this situation? There is a general understanding that there will probably not be a return to all in-person learning. The trend would seem to indicate a hybrid or a blended approach. This would appear to present an opportunity to encourage a more robust policy/strategy of lifelong learning including ensuring equitable, affordable access to the required digital infrastructure.

Recommendations

Based on the challenges and key trends and issues identified above, five specific recommendations were formulated:

i. **Coalesce across boundaries around learners' needs:** the need to put the learner perspective at the centre of whatever organizing structure prevails. We suggest the need to organize around building an entity for cooperation across sectors and domains of learning.

ii. The need to **clarify or define key terms** is urgent as a way of creating common understandings that will bring us closer together within the field, at the national level and as a global community.

iii. To **strengthen and sustain lifelong learning**, there is a need to examine both the "supply side" of formal and informal learning opportunities and the "demand side" of those opportunities. For example, it is important to understand how employers and other organizations encourage lifelong learning of distinct types and breakdown silos that restrict information sharing. This should lead to the strengthening of partnerships between ALE providers and community organizations to provide supportive services that help individuals overcome barriers such as food insecurity, lack of affordable housing, etc.

iv. **Foster an integrated approach and systematic actions**: ALE, in the region, is delivered by multiple providers in multiple venues with varying goals. Programme direction is frequently influenced by providers' funding goals and possibilities as much as by learners' needs and interests.

v. Evidence demonstrates the importance of **more extensive, systematic data collection, research and analysis** in both the U.S. and Canada. A great deal of policy making and program provision is vested in states, provinces and territories. More robust, national level data collection would better inform this decentralized policy and provision and permit broad-based assessment of policy and program impacts.

ICAE AND GLOBAL CIVIL SOCIETY MANIFESTO – 2022

Adult Learning and Education - because the future cannot wait

Adult Learning and Education (ALE) is a fundamental human right of all young people, adults and older adults. It is more than about enabling us to respond to crises: it is about laying the foundation for a common understanding of life in harmony with other people and forms of life in our common habitat, the planet earth. This involves understanding and then tackling systemic issues, structural inequalities, global problems and power issues, on a permanent basis. At present, the world community is struggling with a complex spectrum of human created crises including the COVID-19 pandemic, climate change, negative impact of digitalization, artificial intelligence and other new technologies, the nuclear threat, the weakening of democracy and the use of violent armed intervention in place of negotiation and dialogue. Hence the need, in the words of the UNESCO Futures of Education report, for A New Social Contract for Education. In this context, a new ALE needs to create and embrace long-term, sustainable solutions based upon the transformative power of adult learning and education rather than insist on its adaptive and responsive role. Peace is a precondition for planetary harmony which should be nurtured in the minds of women and men. The return on investments in education, literacy, critical thinking, learning to live together is much deeper, wider and longer lasting than that of investments in military hardware. ALE has a huge capacity to contribute to our personal and collective emancipation in both the life and work contexts.

For these reasons, we - as members of ICAE – reaffirm our commitment to the following principles:

I. First and foremost, **ALE is a fundamental human right** of all youth, adults and older adults – both women and men - a **public endeavour and a global common good**, of which the state is the main duty bearer. This implies recognizing its twin vocation: as a right in itself and as an enabling contributor to other fields (poverty reduction, gender equality etc.).

II. ALE is beneficial both for **personal life-wide and life-deep development and self-realization**, for communities and society as a whole and for the economy. ALE contributes to the creation of more just, equal, innovative, inclusive and sustainable societies, with new decent employment opportunities, increased social mobility and citizen participation.

III. **ALE is holistic and intersectorial**: it includes all expressions of ALE (formal, non-formal and informal), and diverse types of learning in fields such as health, work, culture, citizenship, environment, etc.

IV. **Diversity is at the heart of ALE:** it embraces diverse groups of learners giving particular attention to the vulnerable and those suffering all forms of discrimination.

V. **Adult learning and education is a core component of lifelong learning** and embraces educational activities in three key domains: literacy and basic competencies; knowledge, competencies and skills in continuing education and vocational training; knowledge, competencies and skills in liberal, popular and community education and active citizenship. We believe that **ALE is an essential component of SDG4 and is necessary for the achievement of all the SDGs.**

Therefore, we propose and promote the following premises and actions:

1. **Transformative ALE** nurtures autonomy, emancipation, freedom and democracy, increases the agency of learners and embraces cultural, ethnic, epistemological and linguistic diversity. However, this requires the **achievement of literacy for all**, which is the most significant foundation upon which to build comprehensive, inclusive and integrated lifelong and life-wide learning for all young people and adults.
2. In consonance with **ALE's aim to support inclusion and participation**, ALE should promote pedagogical approaches which are learner centred, interactive, empowering and organized around the principles of participation, cooperation and collaboration.
3. **ALE requires appropriate resourcing**, in which government remains the main duty-bearer for the provision of education (including strengthening the infrastructure), either by securing education for the most marginalised, or by coordinating and regulating the participation of other actors in education and adhering to the international and regional benchmarks.
4. The quality of ALE provision will depend on investment, policies and strategies that recognise the urgent need to further **professionalise ALE** in both the formal and non-formal sectors. This also means ensuring that reliable indicators and data are available to monitor progress through research, which can be carried out in close cooperation with universities.
5. **Gender equality remains one of the main goals of ALE**. It requires enabling the balanced participation of men and women, the use of gender-sensitive pedagogy and feminist epistemology, as well as ALE policies with a special focus on women (above all in literacy initiatives, since there are still almost 800 million illiterate adult people in the world of whom 2/3 are women - unchanged!) and addressing systemic issues of power relations and oppressive cultures for women in various curricula and educational settings.
6. **Vocational education and training** is a key component of ALE, crucial for decent life, autonomy and dignity. Therefore, VET should enable **employment, decent jobs**, comprehensive continuing education, professional development and career options, as well as preventing precarious work and helping those affected by pandemics, climate change, armed conflicts and other crises.
7. Technology can be a driver of progress in education and its capacity to increase the outreach of ALE should be further explored. However, it can also create new barriers to access, make social or collective learning more challenging, widen existing social divides and create new ones. **The problems of our world are not solely technological but pedagogical!** Therefore, the challenges faced by the education sector cannot be solved mainly by digital tools, e-learning platforms and artificial intelligence. The right to education must not be replaced by the right to connectivity.
8. **Civil society plays a fundamental role in ALE.** In order to support adult learners worldwide and maximize the benefits of youth and adult education, mobilization of civil society and social movements is necessary. Thus, as one of the key players, CSO should be recognized as a partner in policy formulation and implementation, planning, monitoring and evaluation.

As members and partners of ICAE, we are united for ALE as a fundamental human right and a precondition for social and ecological justice, well-being, change and transformation, because the future cannot wait.

In line with the participatory and democratic spirit of ICAE, we propose that specific recommendations to be included in the **Marrakech Framework for Action** shall be debated and decided by the participants at the International Forum and included in the final version of this Spotlight Report.

REFERENCES AND SOURCES

AHAED (2021). The Arab House for Adult Education and Development "AHAED" - **Policy Paper for CONFINTEA VII.**

ASPBAE (2021). CSO Spotlight Report for GRALE 5 - Synthesis Report.

BENAVOT, Aaron (2018). The invisible friend: Adult education and the Sustainable Development Goals. **Adult Education and Development**, 85. 4–9. Accessed 22 May 2022 from https://www.dvv-international.de/en/adult-education-anddevelopment/editions/section-1-playing-a-role/introduction/the-invisible-friend-adulteducation-and-the-sustainable-development-goals

BENAVOT, Aaron; ODORA HOPPERS, Catherine; LOCKHART, Ashley S.; HINZEN, Heribert. Reimagining adult education and lifelong learning for all: Historical and critical perspectives. I**nternational Review of Education**, Vol.68, Issue 3, 165–194, 2022.

EAEA (2019). *Manifesto for Adult Learning in the 21st century.*

ECLAC (2015). Economic Survey of Latin America and the Caribbean 2015: Challenges in boosting the investment cycle to reinvigorate growth. (Accessed 18 May 2022 from https://www.cepal.org/en/publications/38715-economic-survey-latin-america-and-caribbean-2015-challenges-boosting-investment)

HALL, Budd (1995). Building a Global Learning Network: The International Council for Adult Education. In: **Adult Education through World Collaboration**. Cassara, Beverly Benner (Ed.), Krieger Publishing Company, Melbourne: Australia.

Harvey, Fiona. IPCC issues 'bleakest warning yet' on impacts of climate breakdown. In The Guardian, 28/02/2022. Accessed 26 May 2022 https://www.theguardian.com/environment/2022/feb/28/ipcc-issues-bleakest-warning-yet-impacts-climate-breakdown

ICAE (2020)**. Citizenship Education and ALE.** *The relevance of citizenship education (CED) for the further development of adult learning and education (ALE) and its impact on (current and future) ALE practice from ICAE's perspective.* **Background paper supporting the thematic chapter of GRALE 5**

ICAE (2021) ADULT LEARNING AND EDUCATION (ALE) – BECAUSE THE FUTURE CANNOT WAIT **-** *Contribution of the International Council for Adult Education (ICAE) to the UNESCO's Futures of Education initiative.*

ILO (International Labour Organization) (2019). *World Employment and Social Outlook: Trends 2019.* Accessed 24 May 2022 https://www.ilo.org/global/research/global reports/weso/2019/WCMS_670542/lang--en/index.htm.

IPCC (Intergovernmental Panel on Climate Change) (2022). Climate change 2022: Impacts, adaptation and vulnerability. Cambridge: Cambridge University Press. Accessed 20 May 2022 from https://www.ipcc.ch/report/ar6/wg2/

NÓVOA, António (2022). CONFINTEA VII draft Marrakech Framework for Action – comments from António Nóvoa.

STANISTREET, Paul. A few seconds of light: Radical futures and the role of education (Editorial), **International Review of Education** (2022) 68:1–9. Accessed 27 May 2022 https://link.springer.com/content/pdf/10.1007%2Fs11159-022-09952-y.pdf

UIL (2022). CONFINTEA VII Regional Preparatory Conference for Africa. Priorities, Challenges and Recommendations.

UIL (2022). CONFINTEA VII Regional Preparatory Conference for the Arab States. Priorities, Challenges and Recommendations.

UIL (2022). CONFINTEA VII Regional Preparatory Conference for Asia and the Pacific. Priorities, Challenges and Recommendations.

UIL (2022). CONFINTEA VII Regional Preparatory Conference for Europe and North America. Priorities, Challenges and Recommendations.

UIL (2022). CONFINTEA VII Regional Preparatory Conference for Latin America and the Caribbean. Priorities, Challenges and Recommendations.

UIL (2009). Global Report on Adult Learning and Education. Hamburg, Germany: UIL.

UIL (2013). 2nd Global Report on Adult Learning and Education (GRALE) – Rethinking Literacy. Hamburg, Germany: UIL.

UIL (2016). 3rd Global Report on Adult Learning and Education - *The impact of adult learning and education on health and well-being; employment and the labour market; and social, civic and community life*. Hamburg, Germany: UIL.

UIL (2019). 4th Global Report on Adult Learning and Education – *Leave no-one behind: participation, equity and inclusion.* Hamburg, Germany: UIL.

UIS (2020). [online] Accessed 24 May 2022 http://data.uis.unesco.org/#

UIS (2017). *Literacy rates continue to rise from one generation to the next.* Fact Sheet No. 45, FS/2017/LIT/45. Accessed 14 May 2022 http://uis.unesco.org/sites/default/files/documents/fs45-literacy-rates-continue-rise-generation-to-next-en-2017_0.pdf

UNDP (2020). *Arab Human Development Report. Research Paper: Citizenship 360° in the Arab Region. Perceptions on Sustainable Development across Countries, Income, and Gender.* Available at: https://arab-hdr.org/wp-content/uploads/2021/03/Final-Citizenship-360-in-the-Arab-Region.pdf

UNDP (2021). *Regional human development report 2021. Trapped: High inequality and low growth in Latin America and the Caribbean.* https://www.latinamerica.undp.org/content/dam/rblac/irdh2021/undp-rblac-RHDR-UNDP-EN.pdf.

UNESCO (2015). Rethinking education: Towards a global common good? Paris: UNESCO. Accessed 8 May 2022 http://unesdoc.unesco.org/images/0023/002325/232555e.pdf

UNESCO (2016). *Recommendation on adult learning and education – 2015*. Paris, UNESCO. Accessed 15 May 2022 https://unesdoc.unesco.org/ark:/48223/pf0000245179

UNESCO (2021). Reimagining our Futures Together: A new social contract for education. REPORT FROM THE INTERNATIONAL COMMISSION ON THE FUTURES OF EDUCATION.

World Bank (2022) *Literacy rate, adult total (% of people ages 15 and above).* https://data.worldbank.org/indicator/SE.ADT.LITR.ZS

CONFINTEA VII

15 - 17
JUNE 2022
Marrakech