This paper examines lifelong learning and its relation to education and training reforms in New Zealand. First, a description is provided of the objectives and characteristics of the lifelong learning movement, suggesting that its beginnings were as a working class movement for social change and economic advancement, and that its programs are characterized by individualized learning, flexibility, self-paced instruction, transitions between different types of institutions, and learner self-governance. The history of lifelong learning in New Zealand is then reviewed from its beginnings in 1914 to the present, highlighting educational reforms undertaken in 1989 to adopt stakeholder-defined qualifications, seamless education across educational institutions, industry training strategies, and student support. This section also describes the replacement of the central and regional offices of New Zealand's Department of Education with a policy Ministry, a qualifications authority, and training agencies. Next, the resulting National Qualifications Framework is described, indicating that it replaces disparate course- and institution-centered credentials with 53 examining boards and agencies, and efforts to implement the Framework are reviewed. Finally, lessons from New Zealand's reform efforts are presented, suggesting that the country has created half a revolution by promoting standards and advocating access, but permitting non-compliance and offering few incentives. Contains 34 references. (YKH)
Half a Revolution: A Brief Survey of Lifelong Learning in New Zealand

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In: Lifelong Learning: Policies, Practices, and Programs
Half a Revolution: 
A Brief Survey of Lifelong Learning 
in New Zealand 

by Peter J. B. Methven and Jens J. Hansen 

This paper examines lifelong learning both generally and in relation to education and training reforms in New Zealand. It is argued that, while a lifelong learning philosophy may arise spontaneously within any culture, its effective implementation is almost certainly influenced as much by the nature of the culture itself and by the educational infrastructure that the culture supports, as by its intrinsic merits. Examples are drawn from both the New Zealand experience and from international developments. It is noted that the transformation of a traditional structure into a framework for lifelong learning has the potential to create counter-productive tensions between educational stakeholders that, in the absence of a supportive culture and infrastructure, undermine the benefits that might otherwise emerge. Although such tensions may be considered an inevitable outcome of developing a national lifelong learning culture, and may cause temporary dislocations of process within education and training, it is suggested that a national climate of flexible entry and active participation in lifelong learning is a significant foundation for economic well-being. It becomes necessary, therefore, for stakeholders to foster and develop both a learning culture as well as associated systems and processes that provide individuals with equitable access to learning opportunities throughout their lives. Without doubt, the role of government in facilitating such development is pivotal.

The growth of the APEC member economies and the opening of those economies to freer trade and investment through the adoption of open regionalism has imposed changing human resource requirements demanding dynamic policy responses in terms of education and training at basic, vocational and professional levels. (Braddock 1996, p. 1)

INTRODUCTION

Education and training systems are generated in concordance with the value systems and contextual infrastructures of societies. Educational values are generally, although not always, congruent to the values held and promoted by the encom-

1In the context of this paper education will be understood to subsume training. This expedient acknowledges the extensive debate surrounding these terms, and the traditional academic-vocational divide.
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They are typically satisfied of the perceived needs of societies in which the pace of social and technological change is modest and employment for life in a single occupation is perceived as the norm (Innis, 1986; Meecham, 1987). Such conservatism may, it should be noted, result in educationists becoming sheltered in progressive isolation from society; autonomy can become insularity, tradition a straitjacket, and structural self-transformation a mechanism for apparent innovation without real change.

Clearly, the inherent weakness of a system in which it is assumed that one can educated for life is that life itself changes. This has never been more evident than in the latter half of this century. Such populist writers as McLuhan (1964), Bell (1974), and Toffler (1980) have adopted as their major theme the frenetic pace and consequences of cultural acceleration. Their original insights have become truisms over time, not merely from the effect of the scientific-technological revolution, which has itself been exponential, but equally from interwoven social, political and economic transformation.

If individuals, organisations, and economies are to maintain control over, rather than be controlled by, their ever-changing social and economic environment, they must first understand it. This can be achieved only by actively building on the reservoir of human knowledge and skills through the acquisition of new knowledge and skills, as they arise and as they are needed. Hence, importance is being given increasingly to continuing professional education, 'just-in-time' recurrent training, and adult education programs (Marsick, 1987, 1988; Marsick and Watkins, 1990; Brennan, 1990).

Such considerations have revived, and to a large extent transformed, the concept of lifelong learning. In its beginnings, and under other names, it was perceived as an instrument of social change and an augmentor of economic advancement. Initially, in the form of mechanics' institutes or mutual improvement societies, and later in the guise of adult, continuing or community education, lifelong learning was originally a working class movement whose purpose was the intellectual, economic and political betterment of those who might otherwise remain an ill-paid, badly-housed, poorly-educated reservoir of cheap labour and occasional cannon-fodder. Lifelong learning's extension, in the first half of the century, was interwoven with the rise of socialism in its various forms, trade unionism, and the embryonic welfare state. Its intention initially was magnanimously liberal (Jarvis, 1987; Merriam and Caffarella, 1991).

In Brazil, Freire (1972) employed basic education and literacy programs in a radical sense for the conscientization of the masses so that the populace could become politicised, and hence influential within the society. Coombs and Ahmed (1974) and Schramm (1977) describe similar development strategies that have been employed in Asia.

From the mid-century on, the lifelong learning movement has survived (albeit, frequently undernourished) against a background of world-wide economic fluctuation. Consequently, enthusiasm and support for adult education have been cyclical in most Western countries, with successive governments alternating policies of relative liberalism and relative authoritarianism. Much of the original idealism associ...
Lifelong learning now appears to have evaporated, and seems to have been replaced by an economic agenda (although what is really needed may be a human resource development agenda).

Lifelong learning policies, structures and practices articulate into learning ideologies that implicitly or explicitly can be embedded into a range of adult education philosophies (Merriam and Caffarella, 1991). Underlying many of these is the (virtually self-evident) truth that knowledge and its applications are fluid: that is, they change continuously, so that much learning becomes outdated even as it is achieved. Consequently, societies need to create educational opportunities that are accessible to all individuals at all times in their lives so that new learning needs are able to be met whenever and wherever they arise. Ideally, learners themselves are able to identify those needs or, if they cannot, they are at least able to obtain guidance as to how their needs might be validly assessed and reliably met. A principal concern of the lifelong learning 'teacher', whose role is more that of a facilitator, is to see that learning needs are identified and provided for.

Lifelong learning systems are characterised by:

- individualised learning, directed by negotiation between the teacher and the learner;
- flexibility of programs, so that learning can occur at times and places that suit the learner;
- an absence of selection processes, enabling learners to proceed at a pace and in a direction that meets their individual needs;
- a blurring of barriers between different types of institutions and the learning workplace, so that credit from one is honoured by all;
- and governance of the learning process by individuals and communities of interest.

A lifelong learning culture is flexible, creative, and responsive. It satisfies the needs of societies in which the pace of social and technological change is accelerating and within which a succession of disparate occupations is becoming the norm for those in employment.

In many economies, the post-school learning sector, though inherently vibrant, tends to languish when denied external support. In Australia, for example, the lifelong learning movement has been equated with a Cinderella that needs constantly to be rescued from the ashes (Senate Standing Committee on Employment, 1991). In New Zealand, Hansen (1972), Harré Hindmarsh (1992), and Harré Hindmarsh, Bell, Addison, Gunn and McGray (1993) have made explicit the decline of this sector when government funding is removed.

### THE NEW ZEALAND CONTEXT

The success or failure of a learning culture rests on two important pre-conditions. It must allow access to those with learning needs, and provide opportunities for those needs to be met. Neither is of utility without the other. In the highly competitive market economies that are developing currently, there are few to whom educational access is inconsequential, although it may, for political or economic reasons, be withheld. Even where access is unrestricted, the infrastructure underpinning learning opportunities may be deficient. This is well illustrated by the development of post-school learning in New Zealand.

With its brief history, geographical isolation and small population, New Zealand is a society in which change can occur quickly, and cause and effect remain relatively easy to disentangle. In the late nineteenth century, from a foundation in middle-class English and Scottish values, New Zealand rapidly established a universal education system funded by the state. As in its Old World model, the path to professional life lay through the universities and was essentially elitist. Primary and secondary schooling acted as a filter for the scholarly. Those who failed to clear an approved succession of academic hurdles, or for whom the marginal utility of an extra family wage exceeded that of further learning, concluded their formal education at the point at which they fell or withdrew.

Access to post-school learning was restricted, at this stage of the country's history, to an intellectual and economic elite. A further minority became tradespeople through apprenticeship programs, while the majority became labourers by default. Educational opportunities were limited, as a consequence, to academic or work-based preparation for the trades and professions.

The real beginnings of lifelong learning in New Zealand, in the sense of providing on-demand access and opportunity throughout adult life, stemmed from the formation in 1914-15 of Workers' Educational Associations (WEAs) in the nation's five main settlements of Auckland, Wellington, Christchurch, Dunedin, and Invercargill. They emerged as a result of cooperation between trade unions and the four regional colleges of the University of New Zealand, which was in turn inspired by 'missionary' visits from Australian and British WEAs. Government funding of the WEA national council (channeled, according to the conventions of the day, through the universities) began in 1920, and a National Council for Adult Education was established by statute eighteen years later.

Many distinguished political figures, including the Hon. Peter Fraser, the Minister of Education who piloted a far-reaching Education Act of 1938, laid the foundations for their careers in WEA classrooms. The underlying motivation was often to 'better oneself' through education and consequent economic and social advancement. It is worth noting, however, that although the WEA of the time offered an alternative means of entry to the established system, it was not, of itself, a genuine alternative. The educational culture remained essentially unchanged. Except for a marginal widening of access for the most able, secondary school qualifications (matriculation) remained the accepted (front-end) precursor to entry into higher education. Moreover, such education remained the sole mode of preparation for a professional
In the post-war period, little changed beyond a more liberal allocation of state funding. Evening classes at secondary schools attracted increasing numbers of adults, as did the emerging technical institutes, whose main purpose was the training of apprentice tradespeople and technicians. Non-mainstream adult learning, however, was largely confined to 'second-chance' school qualifications and hobby classes. The 'community education' contribution of university extension departments of the time tended to focus on the visits of itinerant academics to distant communities, where they lectured on the arcane, picturesque, and only occasionally relevant. ('Byzantine influences on Renaissance architecture' is an example, quoted to one of the authors by a rural activist of the 1950s.) Access had widened to an extent, but opportunities for learning had not. This was not lost on such seminal New Zealand education writers of the day as Garrett (1984) and Shalcraft (1987) who, like their predecessors of the 1920s, applauded the social and economic merits of a comprehensive lifelong learning culture.

From the mid-1970s, an increasingly vocal community education movement began lobbying for meaningful adult education, championing this process as an agent of social improvement. Clients of the sector included the unemployed and occupationally redundant, the physically and mentally handicapped, cultural minorities, and women, for whom access to learning was an unacknowledged need. The assumption that adult education could serve as a vehicle for social change seemed to spawn a logic that the greater the amount of adult education provided, the greater would be the consequent social change. (The proposition is clearly brittle, given that such variables as appropriateness and quality are equally pivotal.) As a result, the range of education and training opportunities offered by the technical institutes and semi-voluntary community education services expanded rapidly.

It was unfortunate that this positive shift in the prevailing educational culture coincided with an economic downturn and a reflexive tightening of government fiscal policy that progressively undermined the supportive infrastructure. The conservative politicians of the day derided publicly, and somewhat disingenuously, the prospect of providing state funding for 'pottery classes and sewing circles'. Nonetheless, the government did, because of pressure from strong rural interests and (it was claimed) for electoral advantage, establish thirteen Rural Education Activities Programmes (REAPs). These were staffed by professional educators covering the full spectrum from early childhood to adult learning (Hansen 1983, 1987; Nash, 1983). The level to which each area was resourced appeared to be a corollary of the degree to which that area was electorally vulnerable. It is clear, however, that access to and opportunities for learning in rural areas did, as a result, proliferate.

At the same time, state funding to other community and adult learning agencies was drastically reduced. The REAPs remained because they were protected by strong rural lobby groups and by the susceptibility to electoral change of the voting areas within which they had been established. Further, during the 1980s, REAPs assumed a de facto leadership of the adult education movement and were the strongest supporters of the National Association of Community and Continuing Education. By contrast, less protected organisations had their funding reduced or rescinded. The WEA's was halved. The National Council for Adult Education, instituted by the 1938 Act, was disestablished. The culture of lifelong learning, barely initiated in New Zealand, was again marginalised, surviving with much voluntary effort but scant official support over the next decade. The state education sector, meanwhile, maintained credentialism in time-honoured fashion by turning out ever-increasing numbers of regulation certificate, diploma and degree holders. Those outside the traditional systems continued to agitate for improved access and opportunity.

The harsh economic climate of the late 1980s precipitated a series of Treasury-inspired educational reforms whose effects are still being absorbed. Its outlines, ironically, are in a report titled Learning for Life (New Zealand Government, 1989). Nonetheless, for the first time the state accepted the paradigm that learning is lifelong and, perhaps naively, that it is a stimulus to economic development. The policies outlined in Learning for Life, and those subsequently refined from them (Methven, Goddard and Thompson, 1994), include:

- the replacement of traditional qualifications with qualifications based upon standards established by stakeholders, including government, employers, teaching institutions, workers' associations, and learners - more or less in that order;
- seamless education - that is, lifelong education and training obtainable across a range of learning environments, including the workplace, and of comparable validity for credit and certification;
- an industry training strategy that includes training entitlements for the unemployed, and for traditionally disadvantaged groups;
- and student support through allowances and loans.

It should be emphasised that, although some acknowledgment of social and equity goals was made in Learning for Life (New Zealand Government, 1989) and in concurrent reports on education, the agenda of government and business was, from then on, driven mainly by economic imperatives, with free-market orthodoxy as the underpinning philosophy. For these stakeholders, at least, it appears that quality of life has become synonymous with competitive advantage.

As a consequence of the report's recommendations, the central and regional offices of New Zealand's Department of Education were disestablished. In their place appeared a policy Ministry, a qualifications authority, an education and training support agency whose role has evolved to focus on coordination of industry training, an education review office with inspectorial functions in the school sector, and a career advisory service. (A number of 'consumer protection' agencies in the education sector - for example, a Parents' Advocacy Council - sank without trace within months of the relevant legislation's enactment.) Governance of state institu-
LIFELONG LEARNING

It is important to note that, in practice, institutions continue to raise barriers to credit transfer, usually (it appears to the external observer) to preserve market advantage.

The process of implementing the Qualifications Framework is incomplete at the time of writing. Nonetheless:

- nearly 100,000 New Zealand learners are 'hooked-on' to the Qualifications Framework, including 50% of senior secondary students and nearly 20,000 Maori, previously considered an educationally disadvantaged group;
- a total of 652 teaching institutions, including 82% of secondary schools, are accredited to deliver programs leading to Framework credit;
- and 22 industry training organisations are accredited to register assessors in the workplace (New Zealand Qualifications Authority statistics).

As Fullan (1993) has observed, however, nowhere is resistance to change more evident than in education. The way teachers are trained, the way learning institutions are organised, the way the educational hierarchy operates, and the way that education is treated by political decision makers, all work to create a sub-culture pre-conditioned to defence of the status quo.

Standards have been pursued with an almost religious fervour by successive administrations.

THE QUALIFICATIONS FRAMEWORK

Central to the establishment of the new education culture is the National Qualifications Framework (Methven et al., 1994). This replaces a plethora of disparate credentials, course-based and institution-centred in the traditional pattern administered by fifty-three separate examining boards and agencies. The Framework is built upon the assessment standard, a short statement of the desired outcomes for a discrete learning area. Sets of such standards articulate into complete qualifications. Being neither content- nor time-specific, standards can be used as the basis for a wide range of education and training programs, both institution and work based. Each is assigned a level within an eight-tier structure, and a credit value reflecting its 'size' in terms of learning effort. Over a five year period, standards have been developed for most of New Zealand's major occupational areas and are beginning to extend to general subjects at senior secondary school level. They have been resisted by the universities, on the grounds that the outcomes of metacognitive learning are too complex to define with the particularity that standards are understood to demand, and that assessment standards frequently become articulated as units of curriculum, which clearly they should not.

New Zealand's example is being paralleled or followed by a number of other countries: Australia has created a national vocational standards framework and is proceeding with a national qualifications framework. South Africa has set up the South African Qualifications Authority (SAQA) based on the New Zealand model. Britain's standards-based Scottish National Certificate and National Vocational Qualifications are well established, and the Welsh (education) Office has a standards-based framework. The USA is beginning to implement National Skills Standards. In each of these examples, a need has been perceived for competence-based assessment standards, particularly in vocational areas, to replace and transcend competitive (group-referenced) qualifications of the past.

The creation of a framework of standards-based assessment makes possible the development of a seamless education and training culture in which credit can be earned in a variety of formal, occupational, and community settings. In theory, such credit can be transferred readily from one learning environment to another, and accumulated across several such environments until a qualification is completed: for example, a qualification may be started at school, continued in a workplace training program, and completed at a tertiary institution. Lifelong learning opportunities are enhanced accordingly, since occasions for earning credit are not limited to specific programs at specific institutions. It is important to note that, in practice, institutions continue to raise barriers to credit transfer, usually (it appears to the external observer) to preserve market advantage.

It could be postulated that empowerment of learners through government funding or employer support might have provided a counter-balance to the dead hand of conservatism. Neither eventuated. A relatively generous regime of state-subsidised tuition fees and learner support has been eroded by the whittling away of institutional per capita funding, a substitution of commercial loans for student allowances, and limits to eligibility for means-tested government assistance. The increasing financial burden on learners has been exacerbated further by structural unemployment leading to fewer part-time and short-term vacation jobs. Eligibility for such govern-
funding as is available is allocated largely to traditional courses in secondary and tertiary institutions. This includes NZ$393.5 million for polytechnics, NZ$46.5 million for teachers' colleges and NZ$608.5 million for universities in 1995/96 (New Zealand Treasury, 1996). The capacity of learners, therefore, to influence through 'consumer power' a greater flexibility in the education and training infrastructure has been repressed.

Employers are key stakeholders in the education and training culture, but this is, despite some inspiring examples to the contrary, a role tardily acknowledged. Nonetheless, employers' organisations in, for example, Britain, the United States, Japan and Australasia, are increasingly involved in the promotion and implementation of training programs at national and local levels. In some countries (Sweden, Japan and Australia, among others) trades unions also assume a leadership role in education and training, because they view ongoing training as a means of improving the economic standing of their members. In other economies, such as New Zealand, trades unions have ceased to be educational providers, after governmental support for union-driven education was first eroded and then altogether removed. The advent of the Qualifications Framework in New Zealand has created some enthusiasm in industry training circles for new forms of occupational preparation, and this has been buttressed by state funding that in 1995/96 included NZ$47 million for industry training and NZ$191 million for pre-employment training (New Zealand Treasury, 1996). However, overall support from industry remains uneven.

The successful establishment of a lifelong learning culture in New Zealand is restrained by a number of tensions, therefore, between:

- free market principles and the public good;
- reformist aims and sectoral conservatism;
- public accountability and academic freedom;
- and national education and training standards and autonomous education and training delivery.

Despite this, the new wave of standards-based learning has probably reached critical mass, and there are few involved in the field of industrial training, for example, who need to be convinced of its merits. Whether the system that is being established is more profit-driven than people-driven remains a moot point that social scientists (and the education sector) should continue to debate. The obstacles that remain - opposition within the educational establishment, inequities implicit in increased private funding and indebtedness of learners, efforts by lobby groups to have traditional qualifications put on an equal footing with standards-based qualifications, among others - should dissolve with time, if the new structure has the merits claimed by its adherents.

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| New Zealand's educational reforms appear to have created their own paradox, in promoting standards while permitting non-compliance, advocating access and opportunity while offering little in the way of real incentives to either. The prevailing political and economic culture, under the influence of monetarist principles, has become adamantly market-oriented in philosophy and practice, the latter reinforced by regulation (termed de-regulation in official circles). Successive governments have adopted or been persuaded into free-market policies that conflict with the growth of a coordinated human resource development strategy. The lesson the reforms deliver is that half a revolution is not enough. To create access without opportunity, or opportunity without access, is a failure of policy. Corrective activity by the government (or by a powerful proxy within society - for example, industry) to support the acquisition of marketable knowledge and skills for all members, first, of the work force and, second, of society in general, will invariably be necessary. This creates a paradox for proponents of the free market, in that the behaviour required to ensure its success, at least in the upskilling and maintenance of a proficient work force, is seen at best as interventionist and at worst as coercive. Neo-classical purists, therefore, appear to be advocating latently dysfunctional strategies, which will not only influence the delivery of essential learning to society, but will also deprive them indefinitely of the work force competencies they need for economic survival. A pragmatic solution for most economies perhaps lies in the nurturing of large-scale education and training partnerships between the state, employers, workers' associations, and communities. Such structures will vary naturally from economy to economy, according to intrinsic cultural, political and economic preferences. Strategies for the resourcing and implementation of lifelong learning initiatives will, consequently, be equally divergent. It is inevitable, however, that those economies continuing to cherish learning cultures and infrastructures inappropriate to the demands of a global market will thereby limit educational access and opportunities for significant groups within their work forces and general population. The downstream effects may be slow to emerge but will be inescapably damaging. For lack of a flexibly trained and responsive working population, they will struggle to maintain a position in the world economy. The future ... belongs to societies that organise themselves for learning. What we know and can do holds the key to economic progress, just as command of natural resources once did. Everything depends on what firms can learn from and teach to their customers and suppliers, on what countries can learn from one another, on what workers can learn from each other and the work they do, on the learning environments that families provide, and, of course, on what we learn in school. More than ever before, nations that want high incomes and full employment must develop policies that emphasise the acquisition of knowledge and skills by everyone, not just a select few. The prize will go to those countries that are organised as national learning systems, and where all institutions are organised to learn and act on what they learn.
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