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Welcome to the 5th International Conference of ISCAE!

We want to welcome all participants to our conference in Las Vegas!

Prior conferences have been in
- Bamberg, Germany 1995,
- Radovljica, Slovenia 1998,
- St. Louis, Mo, USA 2002,
- Bamberg, Germany 2006.

Two book-publications came from the presentations at these conferences:

The aim of the ISCAE-conferences is to collect, share, and discuss the actual knowledge about comparative research in adult education. Comparison means to explicitly identify and analyze similarities and differences in two or more countries and includes the attempt to understand why the differences and similarities occur and what they tell us about adult education in these countries. By this we want
- to document and develop the actual knowledge about comparative research and
- to improve theory and practice in the education of adults.

This conference will be held in conjunction with the conference of the Commission for International Adult Education (CIAE), November 4-6, and the annual conference of the American Association for Adult and Continuing Education (AAACE) November 6-9. We want to thank AAACE, especially AAACE-President Henry S. Merrill and AAACE-President-Elect Linda Morris for their support and help in making this cooperation happen.

We wish good success for this conference, interesting presentations and challenging discussions – and that the international-comparative perspective helps us to overcome ethnocentric blindness: that we learn, irritated by observations in a foreign context, to better perceive and understand our own field and system. And last, but not least: that many meetings person-to-person will enrich all of us with friendship and understanding!

Michal Bron jr, President ISCAE, Jost Reischmann, Vice-President ISCAE

Foreword

Alexander N. Charters, Founding President of ISCAE

During World War II and after peace was established in the world, Adult Education received increasing support from international, national and local organizations of Government and the Civil Society. The necessity for and the means for establishing Adult education became recognized by many organizations and by individuals worldwide. In the 1950’s, descriptive papers in International Adult Education began to increase at the meetings and conferences worldwide. 1970 Roby Kidd and I were invited to speak on Comparative Adult Education at the World Council for Comparative Education Societies in Ottawa, Canada. The Council also arranged for some of us in Adult Education to hold some meetings on Comparative Adult Education at their conference in Sydney Australia in 1996. Over the years, discussions with the Council have been cordial but no statements of cooperation have been made yet.

At the meetings and elsewhere, a few of us in Adult Education began discussing Comparative Adult Education. The generally accepted definition of, and guide to the activities of Comparative Adult Education is: “the study of the same element(s) of the same topic(s) of Adult Education in two or more countries to determine the similarities and/or differences” We frequently gathered informally as individuals, then in groups at Conferences and meetings of International and other areas of Adult Education to discuss Comparative Adult Education. We frequently called meetings sometimes independently of other organizations.

In the beginning there was a reluctance to form a structure to the activity so I continued to act as the facilitator of the group. However as we worked and became known, it was decided to accept a name, “The Committee on Study and Research in Comparative Adult Education” with me as chairman. The focus of the activities and meetings and conferences centered on several activities: The first was to increase the number of members or participants. The second was to have Comparative Adult Education be known to Adult Educators as an area of study distinct from International Adult Education. This separation became evident in the presentations, discussions and written statements. The third was to increase the number of members who volunteered to present papers and became active in Comparative Adult Education. The fourth focus was on publication. This started out by the authors making copies of their presentations available to the participants at the meetings. As the demand increased, the papers were duplicated for distribution after the presentations. Eventually, the papers became edited and published. Finally, the focus was on more structure. With some hesitation, need for the structure became more evident and so the name was changed to the International Society for Comparative Adult Education (ISCAE). The President, Professor Jost Reischmann was supported by a Committee of a few members. There were still no dues assessed as the members, along with their institutions, provided all of the time, volunteers and supporting services free of charge.

We are grateful to Past President Jost Reischmann and current President Michal Bron who have provided leadership over their tenures and provided this conference as a contribution to knowledge of Comparative Adult Education in our professional development.
The first two contributions (Reischmann and Bron) are reprints from ISCAEs publication.


We want to (re)use these methodological reflections also in this conference as background for our discussions - that might justify the reprint. The page-numbers are taken from the original publication.

Jost Reischmann
Bamberg University, Germany

Comparative Adult Education: Arguments, Typology, Difficulties

In this introductory chapter, a short overview of background ideas that frame the reflection on and research of international comparative adult education is given. International comparison is described as an everyday experience and defined as a scientific approach. The main arguments for international comparative adult education are collected here, as well as examples for international activities in the last century. Furthermore, a typology of comparative adult education is presented, followed by a description of difficulties and problems of comparative work. Finally, perspectives for the future of international comparative adult education are offered.

1. International comparison - an everyday experience

When traveling abroad – or hosting foreigners at home – comparison is inevitable; we compare the weather, the prices, and besides many other items, our professional experiences. Comparison proves to be an everyday human strategy. When comparing we find similarities and differences. The perceived differences may lead firsthand to confusion and misunderstanding:

- When I bring a dozen of my students from my university in Germany to an American Adult Education conference, my colleagues are surprised; the average age of my German adult education students is about 23. The average age of the American adult education students my colleagues bring to the conference seems to be around forty.

- When somebody wants to know if my students are undergraduate or postgraduate, I do not know how to answer. In the German higher education system there is - up to now - no equivalent for that distinction. So I explain: After 13 years of school students matriculate at the university where they study pedagogy and andragogy for the next four to five years; after that they go out with a “Diplom” to be valued professionals for the next forty years.

- “But where are the adult learners?” my American colleagues ask me when visiting my university. I am confused: “Why and to what end should adults

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learn at a university and not with their employer or at adult education institutions?”
All of these examples have one thing in common: Both sides become aware that what we are used to understanding as “normal” suddenly does not apply to the international context (e.g.: To become an adult education professional, you have to be in the second half of life. Universities are structured in undergraduate/graduate categories. Adults want and have to change their careers by attending universities). This leads to confusion. Two basically different reactions are possible: either to stick to ones own concepts, and hope that those strangers will adapt to the “right” (= my) way. This reaction describes the ethnocentric position, leading – if power and money comes into play – to colonization. Or to become aware that in our interpretation of our world perception-patterns exist of “how things are”, which are not the only one and only right concepts in the world. The need for more exchange and clarification emerges, leading to an international-comparative reflection and hopefully understanding and valuing.

2. International comparison - a scientific approach
Comparative Adult Education on the scholarly level describes an approach to understanding and forming adult education, in which one or more aspects in two or more countries are compared. This comparison is based on methodically gained data and identifies similarities and differences between the aspects under study. These similarities and differences and their significance for theory and practice of adult education in the examined countries should be explained.
This general definition needs two additional specifications:
1. Although comparison can occur within a single country (intra-national), the term typically stands for ‘international comparative adult education’, meaning the comparison between countries.
2. Many types of international comparative research do not include explicit comparison: “It is generally accepted that most of what is included under the rubric of comparative studies in adult education ... does not include comparison in the strict sense” (Titmus, 1999, p. 36). Perhaps in these cases “comparison” refers to the implicit comparison with one’s own country that inevitably happens when analyzing a foreign country.

3. Why international comparison?
A number of arguments are named that give good reason for comparative research. They might be categorized into curiosity, applicational, and educational arguments:

3.1 Curiosity, Knowledge, Understanding
Humans have a built-in curiosity – the mother of all questioning and research – to know how things are. Thus a first argument for comparison is knowledge - “to satisfy an interest in how human beings live and learn … to become better informed about adult education systems of other countries” (Kidd, 1975, p. 10). This information helps to better understand adult education in a foreign country: “comparative education can make ‘strange patterns familiar’” (Spindler and Spindler in Bray 2003, p. 7).
In addition it is claimed that this knowledge and understanding gained by the outside-look to a foreign country reflects back to better understanding one’s own country: observations made in a foreign context help to better perceive and understand adult education and how it operates not only in the other, but also in ones own country, making “familiar patterns strange” (Spindler and Spindler in Bray 2003, p. 7) - opening through the perceived similarities and differences a new perspective to phenomena that seemed “normal” and “natural” before.
These processes of looking-outside and of reflecting-back are expected to have an effect beyond the mere comparison. It is argued that studying the historical, social, and cultural influences leads “to develop criteria for assessing contemporary developments and testing possible outcomes” (Kidd, 1975, p. 10). Hence “comparative studies of education are valuable as scholarly activities which deepen understanding of the forces which shape education systems and processes” (Bray in this book).

3.2 Practical Application: Borrowing, Copying
A second line of arguments aims toward practical benefit: It is hoped that learning from experiences abroad helps to adapt foreign experiences to one’s own practice; this should help avoid repeating (expensive) mistakes and “re-inventing the wheel”. Bray summarizes in this book that “comparative studies … are … valuable as instruments for policy makers and practitioners to effect improvements by learning about what does and does not work in a range of settings”.
Charters uses the terms “efficiently”, “effectively”, and “useful” to refer to this practical benefit: International comparison is done “in order that international developments may proceed more efficiently and effectively … (and) is useful in developing the theory and practice of Adult Education” (Charters, 1999, p. 55).
Often in this argument the term “borrowing” is used (although Bray in this book argues, that “borrowing is perhaps a misnomer since it implies that the models will be given back after use, which is very rare”). The terms “copying” or “importing” are used less often, because it is argued that the transfer from one culture to another seldom allows a pure copy without adaptation.
One specific expected practical outcome of comparative adult education is that learning from each other supports peace: “Research … assists in developing cooperation and understanding which is a basis for peace” (Charters, 1999, p. 55). Similarly the UNESCO Hamburg Declaration on Adult Education states the hope “to construct a culture of peace” (1997, chapter 14).
3.3 Education, Transformation

A third group of arguments for comparative adult education claims that international comparison changes, educates, and transforms the person undertaking this comparison. “Understanding” and “supporting peace” already mentioned include some of these educational and transformative aspects. But it is argued more clearly here that attitudes and values are changed and transformed, leading to more tolerance against differing ways of life and learning, reducing the fear of the strange. These changes go beyond “knowing” and “using” and include a basic personal transformation: The international-comparative perspective assists to overcome one’s own ethnocentric blindness. Similarly Kidd states that international comparison helps “to better understand oneself; and to reveal how one’s own cultural biases and personal attributes affect one’s judgment” (1975, p. 10). Many researchers confirm through their own experience that these personal, educating and transforming benefits do apply - examples can be found in several contributions to this book.

The groups of arguments justifying international comparative research are by themselves usually taken as self-evident. To support the international comparative idea, practice, and funding more research seems necessary to gain more knowledge about how these processes of knowledge-exchange, borrowing, and transformation in reality happen, how they can be supported, and what makes them more or less successful.

4. The international interest in andragogy

In the emerging history of andragogy - the “Wissenschaft” or science of the education and learning of adults - we find a continuous interest in adult education in other countries, as was previously pointed out (Reischmann, Bron, Jelenc, 1999, p. 11). In the century between Grundtvig (Denmark) and Freire (Brazil) a number of names and ideas attained international currency. The Danish ‘Folkhøjskole’, the English university extension movement, the Swedish study circle, and the American encounter group movement became models for adult education in other countries - even if often the differences between the ‘borrowed’ and the original have not been perceived. Research shows a lot of cross-cultural communication, for example the British-Dutch-German relationship in adult education between 1880 and 1930 (Friedenthal-Haase, Hake & Marriott, 1991).

International travel and exchange has, from the early years, offered key-persons in the adult education movement an important way to shape their understanding: Lindeman (USA) traveled to Germany, Mansbridge (Great Britain) to Australia and Canada, and Borinski (Germany) to Scandinavia.

Institutions were founded for International exchange: As early as 1919 the World Association for Adult Education (WAAE) was founded with the mission “to bring into co-operation and mutual relationship the adult education move-
necessary to gain an understanding of the various ways adult education is experienced in many countries.

5. Putting meanings into boxes: Types of international comparative adult education

The definitions in this field are not really distinct. There are clearly two different aspects when talking about international work in adult education: a more practical, action-oriented perspective, and a more academic, reflection-oriented understanding.

5.1 International Adult Education: Practical, action-oriented

The more practical, action-oriented understanding of international adult education refers to all activities that support learning experiences aimed at the connection with other nationalities and cultures - within or outside of one’s own country. “International adult education refers to the effort of adult educators to work globally in a diversity of contexts in order to educate for liberation, equality, and freedom” (Hall 2005, p. 312). The main focus of international adult education is to educate how to become and behave as a more “international” person, thus leading to more exchange, understanding, and respect, both on a personal and national level.

This perspective includes foreign language courses (which make up about one third of the offerings in German adult education centers), excursions to museums or exhibitions in neighboring countries (which is easy in smaller countries like Germany, where in less than four or five hours - depending on the starting point - Amsterdam/The Netherlands, Paris/France, Zürich/Switzerland, Salzburg/Austria or Prague/Czech Republic can be reached), including a walk around, some shopping, and a local beer. This understanding also includes educational travel tours to foreign countries.

Sometimes this “looking beyond one’s own national borders” is a welcomed byproduct (like in vacation traveling); sometimes it is explicitly planned. For example, after World War II, countries in Europe supported programs that brought juveniles and young adults together in order to build and decorate war cemeteries; the hope was that these international meetings would show the way to mutual learning for a better understanding and peace for future generations. The Peace Corps in the USA followed a similar idea. City sister-ships throughout the world are another example. Also, UNESCO and the World Bank are big players in this type of international adult education (see the contribution of Bray in this book). By taking my students to a conference in a foreign country, I invest these efforts in the hope of “making them more international” – which means learning practical techniques (developing language skills, making phone calls, and knowing how to find something to eat and a bathroom), as well as educating emotions and valuing (the reduction of stress and threat by “the strange” and fostering the perception, valuing, and appreciation of “the different”).

Certainly, this approach is both easier and more necessary in “old Europe,” where foreign countries, languages, traditions, and historically-developed hate is, in many places, only minutes or a few hours away; the goal is to overcome the ethnocentricity of national borders. “Intercultural adult education” is a term that relates closely to this more practical, action-oriented understanding of international adult education. Intercultural education can happen in one country. Here the aims are activities and reflections that serve the understanding and peaceful cooperation between ethnic groups in a society (including the majority in this learning process). Thus the focus of international/intercultural education is the practical, action-oriented aspect of “educating adults in international perspectives.”

5.2 International Comparative Adult Education: Academic, reflection-oriented

International comparative adult education - the center of this paper - has a different focus: it has a more academic, reflection-oriented perspective, it emphasizes a more theoretical approach, gaining knowledge and understanding about adult education in other countries, and is accomplished with some methodological rigor.

Knowledge about the education of adults in other countries can be gained from various sources, and several types of comparative research can be categorized as follows:

0. Travelers tales

A first source, rated often as “pre-scientific” and characterized as “subjective-impressionistic”, are the reports given by international travelers. The first chapter of this article was written on this level. Such reports are delivered by traveling writers or vacationers, but also by scholars who attend a conference abroad and have to report to their funding agency, and simultaneously publish this report in a journal. More systematic descriptions are categorized as ‘travelers reports’ and less systematic ‘travelers tales’.

Their value is considered to be ambivalent. On the one hand because of random observation and subjective description, it is argued that it is not clear how reliable and how representative the descriptions are. On the other hand the plea is made that, especially because of the subjective focus of eye witnesses, this type of report might possess a specific strength. The quality very much depends on the quality of the reporter. A scholar of adult education with international experiences, trained to reflect on his personal bias and knowing that different models and traditions exist, certainly may be seen to be more objective, reliable, and valid than a normal vacationer. A number of contributions in this book, when referring to “lessons learned” without using specific research
methods, use this access - and do in fact identify important learning insights. In the framework of a new appreciation of qualitative research, these reports may receive renewed interest.

1. Country reports, single nation studies
A first stage of scholarly international adult education was the country report. Country reports try to describe the system of adult education in one country, as proposed, for example, at the 1966 Exeter conference: ‘to identify and describe the existing adult education programs within each country in order to make the relevant data available to scholars in their own and in other countries for comparative analysis’ (Charters & Siddiqui, 1989, p. 3). “Adult Education in the Republic of . . .” is a typical title of this type of report. But the hope to use them as a basis for later comparison was seldom fulfilled. Too different were the approaches, the selection of the focus, or the data presented. These single nation studies were often presented under a specific perspective: “Single nation studies are directed almost entirely at foreign audiences” (Titmus, 1999, p. 37). Country reports were presented mainly during the 1970s and 1980s. They could be written by an author within the country or by a person from the outside - this fact making a clear difference which has not been researched yet. Some of these reports are rather impressionistic; others follow a well-developed outline and structure. An example of the renewed interest in country reports is the series of “Country Portraits” published by the German Institute for Adult Education (DIE) from 1997 on, presenting for example Greece, Switzerland, Spain, Finland, and Germany (in German and English).

2. Program reports, topic-oriented studies
Since attempts to describe a whole national system were seldom successful, program reports focus more narrowly on descriptions of adult education programs, institutions, and organizations in a distinct country. During and after the 1980s an increasing number of program reports were presented. Examples of this type can be found in the writing of Charters and Hilton (1989) or the case studies collected by Knox (1989). Included in this category (sometimes categorized separately) are the topic-oriented studies or the problem approach, in which not a program, but a certain topic or problem is discussed in the context of a nation.

The observation in the ISCAE-conferences give the impression that there is a growing interest in this type of exchange: On the background of one country specific topics - for example aging or leisure time - are presented and discussed, with a clear “message-of-invitation” to colleagues of other countries to engage and exchange, based on their national background.

Country reports, as well as program reports, topic-oriented studies, and the problem approach, are mostly more ‘international’ and less ‘comparative’. Since only one country or program is presented, no comparable object is available.

Especially when an author presents his own country or program to a foreign readership in various countries, it is difficult for him to compare with another national system. If, for example, a German author describes a German program in an English publication, should he draw parallels to the English, Scottish, US-American, Canadian or Australian systems? This mostly leads to the consequence that readers have to draw the comparative conclusions themselves. As Titmus comments: “To make sense of these studies, readers will inevitably compare them with their knowledge of their own national provisions” (1999, p. 37).

3. Juxtaposition
Juxtaposition collects and presents data from two or more countries, but no explicit comparison – where are the similarities, what are the differences? – is given. These reports show that in country A we can observe X, while in country B we find Y. A quantifying approach to juxtaposition is offered by a series of statistical reports; another approach is descriptive, for example the German international volume of the Handbuch der Erwachsenenbildung (Handbook of Adult Education, Leirman/Pöggeler, 1978) or Peter Jarvis’ (1992) Perspectives on Adult Education and Training in Europe. Juxtaposition can also be topic- or problem-oriented when a topic is presented in a series of contributions from various countries. For example, Pöggeler’s The State and Adult Education (1990) brings together a series of articles discussing the role of the state in different countries.

4. Comparison
Comparison in the ‘strict’ understanding of ‘international comparative adult education’ reports from two or more countries and offers an explicit comparison making the similarities and differences understandable. ISCAE here uses the definition of its “founding father” Alexander N. Charters:

A study in comparative international adult education ... must include one or more aspects of adult education in two or more countries or regions. Comparative study is not the mere placing side by side of data; ... such juxtaposition is only the prerequisite for comparison. At the next stage one attempts to identify the similarities and differences between the aspects under study ... The real value of comparative study emerges only from ... the attempt to understand why the differences and similarities occur and what their significance is for adult education in the countries under examination. (Charters & Hilton, 1989, p. 3)

This type of research can for example be found in the final chapter of Charters and Hilton (1989).

In this strict understanding, country reports and reports about programs or topics in one country are not a part of international comparative education. Furthermore, juxtaposition - the side-by-side placing of data and descriptions from two or more countries - is not at the stage of comparison. In the strict understanding, it is necessary that similarities and differences get explicitly worked out with some methodological rigor. While the more general interna-
tional aspect in adult education has a long tradition, only a small and limited amount of research into adult education has been done comparatively.

5. Field and method reflecting texts
These texts reflect the methods, strategies, and concepts of international comparison, and include summarizing reports about developments in the international comparative field on a material or meta-level. The article at hand is an example for this category. Research methods, problems, and pitfalls were a central focus of ISCAE’s first conference and are documented in Reischmann/Bron Jr/Jelec (1999).

6. Reports from international organizations
A bit outside of this system, but still counted as part of the international tradition are reports from transnational institutions such as UNESCO, OECD, or the World Bank. Joachim Knoll, Professor (em) at Bochum University, Germany, is one of the key persons supplying such information.

Further reflections
For these different approaches we used the term “types” (and not “stages”). Certainly, in the history of comparative (adult) education times can be identified when one type was predominantly used and valued. But what can be proved through many conferences and publications, even in this book: All these types exist and are used today, representing different approaches in the collection of available methods for different intentions.

There is not yet a final answer to the question: Where does “international adult education” end and where does “international comparative adult education” begin? Addressing this question, Wilson uses the term “twin fields” and asks: “Comparative and International Education: Fraternal or Siamese Twins?” (1994, p. 449). In a strict sense, two discriminations seem to be clear - “Comparison” can only be done when at least two objects are available, and “International” means different countries. So an international comparative study has to refer to at least two countries. Charters and Siddiqui (1989) draw clear limits:

A study that compares two or more aspects of adult education in a single country is merely an instance of intra-national comparative adult education. Similarly, a study that describes one or more dimensions of adult education in two or more countries without comparing them is an example of international adult education, not of comparative adult education. (p. 5)

Following this strict definition many presentations, papers, and research should be more appropriately labeled as “international” rather than “comparative.” This is true for the book in hand. Bray similarly states in his editorial introduction to the book with papers from the 11th World Congress on Comparative Education, held in Korea in 2001, “The fact that only one quarter of the articles explicitly take national level foci … is indicative of a further paradigm shift in the field” (Bray, 2003, p. 9). Confirming this shift we already cited Titmus (1999), respected British scholar in international comparative adult education, who offers a much less strict understanding of comparative research in adult education: “It is generally accepted that most of what is included under the rubric of comparative studies … does not include comparison in the strict sense” (p. 36).

Similarly Knoll, a longstanding German expert in the international field, states that “very few pieces of research work that are - according to their self-definition - ‘comparative’ really deserve this attribution. They normally approach a phenomenon in a problem-orientated or in a country-monographic way without considering a tertium comparationis” (Knoll, 1999, p. 20).

The scientific community will have to come to an agreement about this question. Looking back to the results of the “call for papers” in four ISCAE-conferences proves that many researchers prefer the “wider” understanding of “comparative adult education”, thus confirming Titmus and Knoll.

Most researchers in comparative adult education agree that international comparative adult education is at a beginning stage. But activities, research, conferences, and literature prove that a lot of clarification already has been done, knowledge is available, and methods are developed (i.e. Bereday, 1964; Noah/Eckstein, 1969; Kidd, 1975; Leirmann/Pöggeler, 1979; Charters/Hilton, 1989; Charters/Siddiqui, 1989; Jarvis, 1992; Knox, 1993: Reischmann/ Bron/Jelec, 1999).

6. Difficulties and problems of international comparative work
It certainly is challenging and rewarding to get a wider view of our world through an international orientation, but there are also handicaps that hinder research in comparative adult education. Just to name some of them (for a more comprehensive description see Bron Jr in this book):

One problem is that the continuity of scholarly work is not guaranteed. Only a small number of scholars work in international comparative adult education as their main field; others enter for just a short period of time or work. The knowledge developed in comparative adult education is scattered in many places, languages, and countries. This makes it difficult for new researchers to start working in this field. To build up continuity it is necessary to bring together the knowledge, experiences, discussions, and standards of the ‘why’ and ‘how’ of international comparison, so that researchers can refer to and build upon an internationally shared set of research methods. To serve the continuity in this field through networking, conferences, and publications, the ‘International Society for Comparative Adult Education ISCAE’ (www.ISCAE.org) was founded.

Part of the continuity-problem is the regular attendance at central international meetings. Person-to-person contacts are essential in this field: “International Conferences Built Bridges” is one of the lessons learned in Henschke’s contribution in this book. To enter this field and to stay in its...
networks entails traveling and being visible. This visibility requires a considerable investment of time, energy, and money; additionally, the investment also has to be made in times when no comparative project is being carried out and no extra project money is available.

It is evident that international comparative research has clearly higher costs. It is time-consuming and not always successful to find foundations willing to support international projects. National foundations are often not interested in paying the costs of the foreign partner. My experience through ISCAE is that most conference participants attend on their own money, sometimes with some limited support from their university or foundations. Funding agencies should do more to not just assist international comparative research projects but especially to encourage and finance the possibility of bringing young scholars into this field.

An often discussed topic is how comparison can be done between different cultures: Are researchers knowledgeable enough to understand the aspects under study in a foreign cultural context? A number of the contributions in this book (and the 1999-ISCATE-publication) address this problem. The reality of international comparative studies show that this problem can not be “solved”, but it can be reduced when the aim is not ‘perfect’ but ‘better’ understanding, and when the work is carried out in dialogue with foreign partners for communicative validation (Knox, 1993).

A clear handicap is language. Besides the cultural and linguistic problems (see Jütte, 1999), researchers have to cope with a number of practical problems: International communication takes place in English, but for the majority of the world, this is a foreign language. In discussions, this raises difficulties: native English speakers are always faster! Communicating – even more, publishing – in the foreign language takes many times more effort than in one’s native context. Secretaries are often not trained to write English, so the researcher has to type everything himself. When making citations, the English literature is often not available in foreign libraries, and it makes no sense to refer to the knowledge and experience of non-English research literature, because this literature does not exist for the international readership. Thus researchers from non-English countries, when working in the international context, loose most of their national scholarly background that is based on their native language - content, theory, and methodology. When publishing, a native English speaker always has to be found for proofreading. On the other hand, native English speakers with no command of a foreign language always depend on more or less reliable translations - a wide open field for misunderstanding.

Of course, international comparative projects have a lot more obstacles than research carried out in one country. A foreign partner has to be found and has to be convinced to join a project. Many details have to be clarified before and during the research process and at the end for the publication; such discussion requires continuous exchange. In most cases, one partner also carries an extra load of translation when the other partner does not speak his language.

Comparative research means a high investment of money, time, and effort. This is a problem especially for young scholars. When weighing the potential outcome of these investments for one’s career, a scholar often finds it more beneficial to work at the national level.

7. Prospects

International adult education and international comparative adult education share the fate of many good ideas: everybody agrees that they are important, but not many are willing to take the load of the international work on their shoulders and purses. Experiences in international and international comparative adult education have been developed in many countries. The important task is to encourage continuing work in this field, building on previous results in order to develop these experiences further.

More international knowledge, respect, and understanding are certainly needed in today’s world. The personal benefits of being a more “international” person include understanding, open mindedness, tolerance, and humility - and good times with good friends in many places in the world. Those working in international comparative adult education report how personally enriching and rewarding they experienced the wider world-view gained through an international orientation.

From a global perspective, learning from each other is an essential, basic necessity. The UNESCO Hamburg Declaration on Adult Education (1997) put this perspective in words: “One of the foremost challenges of our age is ... to construct a culture of peace based on justice and tolerance within which dialogue, mutual recognition and negotiation will replace violence, in homes and countries, within nations and between countries” (Chapter 14).

International comparative adult education faces challenging perspectives - in theory and the field of practice.

8. References


The page-numbers are taken from the original publication.

**Pitfalls in Comparative Studies**

**Inherent and Self-styled Dangers**

**Problems of comparative inquiry**

Every academic endeavour faces a number of problems that have to be dealt with. The goal of this chapter is to raise an awareness of the risks of falling into various traps awaiting researchers in comparative adult education.

When pursuing an inquiry, a researcher in comparative studies can encounter three types of problems:

a) **Difficulties** typical for all research undertakings within the social sciences, such as objectivity, reliability, validity, selection, sustainability, reactivity, interpretation or consistency. They were/are widely discussed in the methodological research literature (cf. Campbell & Stanley 1967; Lincoln & Guba 1985). Since these methodological difficulties are common to all research in the social sciences, this chapter will not pursue further discussion on the topic.

In addition to these general difficulties, international comparative studies cause specific problems (cf. Reischmann, Bron Jr & Jelenc 1999; Titmus 1999; Hake 1999; Reischmann 1999; Blaise 1999). The two types of problems are:

b) **“Obstacles”** – often painfully experienced, visible difficulties which researchers have to overcome when working with international comparisons. The most frequent are the lack of comparable information, variation in the quality and reliability of statistics, lack of uniform definitions, non-availability of English publications, lack of coherent translations or competent proof-reading, incidence of travel expenses, communication problems, and the dependency on foreign contributors/information. Another crucial issue which has preoccupied researchers of comparative studies for years is the issue of whether questions and answers can be meaningfully translated from one language, and one social reality, into another. Probably most of the comparatists would subscribe to Wittgenstein's observation, that *Die Grenzen meiner Sprache sind die Grenzen meiner Welt* (the limits of my language are the limits of my world). Obstacles are considered as ‘normal’ because they must be tackled in almost every comparative research undertaking. They make this
type of research more laborious, time-consuming, and – not the least – expensive. They cannot be avoided and occur frequently enough to be considered as inherent to this type of study. Obstacles are often ‘objective’ or ‘external’ to a researcher.

c) Pitfalls, however, are a more intricate phenomenon. They are often unconscious mistakes, ignorant assumptions, or self-inflicted misinterpretations. A pitfall is usually a ‘self-styled danger,’ because the problem stems from the limited understanding of a researcher. Thus, a researcher, a team leader, or an editor is ultimately accountable for the pitfall. For example, when a researcher is not aware of or ignores the fact that an American high school does not whatsoever equate to a German Hochschule, or a Swedish högskola, or a Polish szkoła wyższa, despite the striking similarity in names (a phenomenon called in linguistics ‘false friends’), then the researcher becomes trapped in a pitfall, producing results that are corrupted and misleading.

Unlike obstacles, pitfalls can, in many cases, be avoided. The objective of this chapter is to increase an understanding of pitfalls in comparative research, in order to prevent falling into such traps.

Pitfalls – list I

In this chapter I discuss pitfalls which threaten comparative studies. Some decades ago, the Belgian sociologist André Köbben (1979) described five pitfalls that burdened the social sciences and the humanities. He named them no less sarcastically than I will name mine when building on his list.

His first pitfall is named ‘spurious similarities.’ This occurs when data from completely different societies are extracted from already published studies and analysed within a new frame of reference. During this process, as Köbben rightly warned, various ‘phenomena are frequently brought under one label whose meaning in the context of their respective societies is widely dissimilar’ (Köbben 1979, p. 2). Comparatists face this problem quite often. The most common example is in employing the same name to denote different educational institutions or phenomena (e.g. ‘high schools’ or the actual academic standard of institutions of higher education in European countries and the USA). That there are almost always differences regarding terminology and definitions of concepts used in educational statistics is quite understandable (cf Bron Jr & Bron 1983, pp. 48-51). Thus, what is required from a researcher, is to be aware of those differences. A platitude, which too often ought to be considered as a warning, is that ‘similar things need not to be identical things’ (Köbben 1979, p. 3).

The next pitfall – the ‘mis-use of surveys techniques’ – deals with the very popular technique of gathering empirical - mostly quantitative - material (especially in sociology); namely surveying. The fact that surveys are relatively easy to employ leads to a situation where too many researchers omit the fact that in many cases these techniques should be exchanged for other ones ‘if only for the obvious reason that there may be a gap between what people say (when being interviewed) and what they do, especially when sensitive topics are involved’ (Köbben 1979, p. 4). The problem lies not in the use of this technique but rather in its misuse and in the exaggeration of its values.

The third pitfall identified by Köbben is that of ‘inductivism,’ which became prevalent again in the late 1960’s and in the 1970’s. The use of computers contributed to circumstances whereby researchers became tempted to correlate data from completely different cultural settings. Too often it has been done ‘without much sense of theory or problem’ (Köbben 1979, p. 5). In taking a closer look, we find that repeatedly, relationships between studied phenomena turn out to be just coincidental. Researchers enchanted with computing data forget to verify if established correlations are a sheer coincidence or actual relationships.

Köbben’s pitfall ‘scientific involution’ is derived from the organization and conduct of a research project. One has to deal with it when a research enterprise turns out to be “so complicated, and people/states have invested so much energy and skill into it that for that very reason it is hard to drastically change it” (Köbben 1979, p. 6). The resulting consequence might be twofold. Most comparative studies which involve international research teams are usually costly and lengthy. Many years can elapse between their commencement and conclusion. Nevertheless, and precisely because of the time and work invested, they will still be carried out. The risk involved is that “the theoretical premises of such studies (if any) may very well have become obsolete once they are halfway” (Köbben 1979, p. 7). The second possible effect of a ‘scientific involution’ pitfall is of more serious threat to the quality of a given research project: The risk is that to save time and money the same old data will be used over and over again.

The last of Köbben’s pitfalls – ‘Galton’s problem’ – is intellectually much more challenging and the most difficult to avoid. Its name is inspired by the British scientist Sir Francis Galton (1822–1911). He questioned to which degree the phenomena, compared to each other, are independent of each other. For, as he argued, it may well be that both are copies of the same original. Assume that several countries are characterised by the existence of similar educational institutions, say folk high schools, and that it is convincing to state that this type of adult educational institution originated from a ‘common source.’ Thus, while calculating statistically, should they be treated as only one case or as several cases? There is no question that local varieties exist and that different cultural and social factors contribute to the development of folk high schools in each of their respective countries. However, as Köbben concluded for ‘Galton’s problem,’ “the element of diffusion (imitation) should not be neglected” (Köbben 1979, p. 7).

In addition to Köbben’s list, an analysis of a number of comparative studies of the last two decades (listed at the end of this chapter) revealed several more pitfalls that endanger international and comparative studies of adult education.
Pitfalls – list II

In the following I discuss some more conceptual and methodological shortcomings that threaten comparative research. As I build on Köbben's list of pitfalls, my intention is not to criticize the analysed literature in general. If I disagree with, or qualify some contenions, this should not be taken as questioning the quality of the whole book. Several of the analysed books, even if criticised, often identify important educational issues, provide a number of useful information about problems, and attempt to provide solutions in various societies. Criticism focuses on the level of success or failure of a study’s fulfilment of comparative inquiry requirements. The goal is to create awareness of the pitfalls, and by this, to emphasize their avoidance.

“Descriptiveness” pitfall

Building on Köbben's list, my first pitfall deals with the most common weakness in comparative studies, namely non-analytical descriptions. Authors of books in comparative studies describe instead of interpreting. The tables of content of such books often give the impression of being comprehensive and ‘all-covering.’ On the contrary, they usually consist of statistical figures and general information on school systems, they list types of adult educational institutions and ‘enrich’ them with a number of historical data, laws and regulations.

An early example of the “descriptiveness” pitfall can be found in Polturzyckii's (1981) book on adult education in socialist countries. Describing ten countries, the author enumerates elements of educational systems of countries under investigation, e.g. policy, legislation, financing, curricula, students, teachers’ training etc. The result is a 340-pages volume describing the existence of educational provisions for adults in Bulgaria, Czechoslovakia, Cuba, East Germany, Hungary, Mongolia, Romania, Poland, the Soviet Union (one-fourth of the whole book), and Yugoslavia. The main part of country chapters is devoted to lengthy descriptions of the historical development of a given form of educational activity. The only actual attempt towards comparability is Polturzycki's way of structuring the descriptions.

What we expect from a comparative study is that its author(s) look(s) explicitly for similarities and differences. Even more, it should not be enough to simply state that something is or is not similar/different. A comparison ought to include explanations and reflections on why the similarities or differences occur. Shallow and rhetorical statements do not replace an analysis. Some authors seem to be unaware that although interpretation is indeed related to description, it also differs from it by its emphasis on relationships.

Naturally not all studies intended to be comparative achieve this goal. It is sometimes argued that although comparative analysis ought to lead to generalizations and not to a report of descriptions of separate systems,
Thus, the same structure was used to describe highly centralised and uniform(ist) educational systems, as well as systems run by federal states with decentralised and diversified provisions (within educational systems in general and vocational education in particular). Various educational phenomena from several disparate countries were subsequently simply juxtaposed in this book.

The two above-discussed studies show that when similar (English) terms are used to describe and interpret different educational realities the result can lead to seeking and examining non-existing phenomena or a situation where one is working “with one term and two concepts” (Mokrzycki, 1982, p. 47). Thus, to avoid this pitfall, sensible exchanges between the editor(s) and individual contributor(s) are needed before and during the research process. Time spent on discussing and defining ideas and terminology “may also prevent undue concept-stretching” (Lovenduski & Woodall, 1987, p. 13). Discovering and explaining incompatibilities in such a sensible, mutual process would add more to our knowledge and understanding of educational realities rather than insisting on a rigid structure of categories encompassing incomparable concepts.

Comparing seemingly incomparable phenomena is possible and this has been proven by a study undertaken and impressively accomplished by Adam Przeworski (1991). He was concerned with establishing the comparability of a broad and an apparently disparate set of cases. Przeworski stressed the similarities between the socialist state regimes of Eastern Europe and the bureaucratic authoritarian regimes of Latin America. The strength of the book lies in the effort it took to find and apply an analytical model to study seemingly incomparable phenomena and processes.

“Compartmentalization” pitfall

The third pitfall is called “compartmentalization.” It directly criticizes books which laboriously describe some parts in detail and at the same time fail to see the whole. They illustrate how often there is hardly a common ground for individual contributions. Individual authors commissioned for the book write about a number of problems without a common platform for analysis and an editor(s) withdraw(s) from comparing phenomena described by contributors. The final products are books consisting of articles which originally aimed at giving a congruent picture of a given educational phenomenon, but instead, fail to do so. Such a way to organize and plan for a book can lead to an unexpected result that “almost every contribution seems to have been locked into a sterilized compartment, with no possibilities of mutual contamination or of catalytic interaction” (Kozol, 1982, p. 55). The result is a study containing many factual details but few pertinent comments on the essential social and educational issues at hand.

“Compartmentalization” can be found in the book, Adult Education in Yugoslavia, edited by Soljan, Krajnc & Golubovic (1985). It is a collection of 32 papers covering an extensive number of topics; though they do not sum up to a coherent whole. For example, despite three chapters on adult education personnel, none of them discusses the problem of abandoning the profession or the ‘snatching’ of the most energetic and competent adult educators by various state or party authorities.

The book does not give a reader a deeper understanding of adult education in Yugoslavia. It contains many factual details but few pertinent comments on the essential social and educational issues of the country.

The second example of this pitfall is illustrated in the book, Emerging Issues in Education, edited by Arnove, Altbach & Kelly (1992). The book intended to describe and comparatively analyse inter-relationships between a number of issues in education which emerged in the late 1980’s. Despite this aim, collected essays present a variety of themes with no clear central subject.

This collection of essays present rather traditional issues such as educational reforms, teaching as a profession, school tests, school administration, and financing, leaving significant ‘emerging issues’ overlooked or ignored. Most of the contributions are written in the realm of the traditional functionalist approach. The authors use mostly a policy perspective; focusing on state initiated/run school reforms, allocation policy, centralisation versus decentralisation, public versus private, and the like. As such, this variety of articles fails to give a congruent picture. The authors commissioned for this volume write about widely spread-out topics without a common platform of analysis. Even the concluding part of the book presents some topics without an attempt to relate them to other texts published in the book.

In both the above-mentioned examples, contributions seem to have been written without the knowledge of or a correlation to the parts they are supposed to accompany. To show that it is possible to avoid the “compartmentalisation” pitfall I would like to present two studies. The first one is entitled, Continuing Education in Higher Education (Titmus, Knoll & Wittphoth 1993). It is a study of when, how and why higher education systems opened to new kinds of students and new forms of training. The book is a wealth of facts, analyses and conclusions drawn from the comparison of higher education in three countries: France, Germany and Great Britain. One of the reasons for achieving a good result is the way the whole project had been conceptualised and carried out. The three authors wrote the book together rather than having divvied up the country chapters between themselves that would later be ‘compared’ to one another.

“Sophisticated superficiality” pitfall

The fourth pitfall in comparative (adult education) studies is labelled “sophisticated superficiality.” The books succumbing to this pitfall are guilty of two ‘sins.’ Firstly, they are dominated by an enchantment with numbers, numerals and formulae. Secondly, they neglect the cultural settings of studied problems. Researchers who have been trapped by this enchantment neglected or ignored
certain essential phenomena, as for example: Kandel’s (1933) forces which
determine the character of an educational system; Hans’ (1933) factors often
common to many nations; Mallinson’s (1957) determinants; and King’s (1967)
contextualisation of an educational system.

As Michael Sadler (1907) said many years ago: What goes on outside a
school is far more important that what goes on inside because it influences and
affects what goes on inside. Since then, all leading personalities in comparative
education advocated for the necessity to take into consideration a country’s cul-
tural, social, political and economic conditions, while investigating its educa-
tional systems. However, the introduction of statistical methods in the social
sciences and the development of their techniques with the use of computer-based
counting routines led Sadler’s, Kandel’s, Hans’, Mallinson’s and Bereday’s
(1964) cautions, demands and pleas into oblivion. Naturally, I do recognize
statistical methods as a legitimate way of gathering and analysing empirical
material in the social sciences. However, if they are based on wrong assump-
tions then all the technical ingenuity and sophisticated computation is little more
then an intellectual devise to save ungrounded hypotheses or to omit the intrica-
cies inherent in the question of ‘why.’

The book, The Young Manual Worker in Britain and Sweden (Murray &
Haran, 1986), proves to be an example of the “sophisticated superficiality” pit-
fall. Although it is an interesting book, it has all the shortcomings characteristic
of a statistical approach to social (and cultural) phenomena.

The book deals with the psychological and social dimensions of the problem
relating to the transition of students from schools to work. To achieve their
objective, both authors implemented a relatively rigid methodological design
and used a set of different techniques. According to their research findings, the
biggest differences observed were between the British and Swedish samples,
which led to the conclusion that there is “a consistent sexual equality view
adopted by the Swedish group” (Murray & Haran, 1986, p. 76). This is ob-
viously a correct conclusion drawn from the Multivariate Analyses of Variance
and Covariance, but it does not give us any clues as to understanding why it is
so that the Swedish male youth experience differed so much in this respect from
its British coevals. To illustrate another example (typical of this pitfall) from
their concluding research findings, the Swedish sample exhibited “a more closed
way of thinking,” while according to scores on ‘Dogmatism,’ the British sample
demonstrated “the greater sense of powerless-ness. Instead of trying to explain
why these differences manifested, the authors proceeded to present results of
another sophisticated statistical technique.

Research used in comparative studies that relies only on quantitative
methods does not usually provide a reader with explanations based on cultural
phenomena. It fails to seriously consider a warning that ‘it is not a matter of
statistical representativity any more but a matter of ‘qualitative reasoning’ and
argumentation what one may learn about the comparative findings” (Peschar,
1971, p. 73). A use of sophisticated statistical techniques, coupled with an
awareness of the necessity to anchor them in cultural settings is, of course possi-
ble. This can be achieved by being sensitive to nation-specific characteristics (cf.

An example of how to avoid the “sophisticated superficiality” is illustrated in
the study Gender Inequality (Vianello & Siemienstka, 1990). This is an important
but difficult book. Its difficulty arises partly from its use of multivariate methods
which may not be easily grasped by all who read it. The seven-person research
team jointly authored the book rather than have it be an edited compilation of
individual papers. The sober and un-biased use of statistical methods enabled the
research team to discern and corroborate their findings; that socio-political sys-
tems do not necessarily divide the countries into dichotomies.

“Double-decker” pitfall

The fifth pitfall has been metaphorically named the “double-decker.” It char-
acterises those collective studies in which there is an apparent inconsistency
between editors’ intentions and aims and how they are met by contributing
authors. Differences usually relate to a discrepancy between editors’ theoretical
and methodological perspectives and their ambition to compare, versus an indi-
vidual contributor’s descriptive focus on studied phenomena.

Two kinds of such a pitfall can be distinguished. Although all researchers
involved are sailing in a single vessel being navigated by the same navigating
crew member(s) or captain(s) [editor(s)]:

1. the ship’s general crew members/mess [contributing authors] are left on the
lower deck [usually a thorough and competent base of facts, analyses and
interpretation within the realm of a study area], while the navigating crew or
captain(s) [editor(s)] fail(s) to encourage them to climb to the upper-deck; or

2. the ship’s general crew members/mess [contributing authors], guided by the
navigating crew or captain(s) [editor(s)], hurry to the upper-deck so quickly
that they provide their expedition sponsors [readers] with a pleasant and
interesting description of the passing landscape, but leave them with no suffi-
cient knowledge of it.

In some cases the reader can have the impression that in following the
editor’s/editors’ policy, authors of individual chapters focused too much on
describing the given phenomena instead of paying more attention to explaining
and analysing them.

Two books can exemplify this pitfall. The first one is entitled, Education in
East Central Europe (Karsten & Majoor, 1994). Its introductory chapter is good,
to the point, competent and thought-awaking. It demonstrates a first-rate under-
standing of ongoing processes, but not of their historical backgrounds. It intro-
duces problems faced by scholars (and politicians) in East Central Europe well.
The sixth pitfall is called a “motorway” pitfall. It is rather typical for studies which are characterised by the following features: like the previous pitfall, it always results from a collective project; contributing authors are expected to comply with a clearly designed format; and an editor’s/editors’ conclusions are usually going beyond actually contributed case-studies. The pitfall occurs when the editor’s/editors’ intentions and instructions have been neglected by contributing authors. As a result, a reader is left with the impression that the main body of a given book, and introductory and concluding chapters resemble two vehicles moving in opposing motorway lanes. Characteristics of the “motorway” pitfall result from the fact that the competence and scholarship of individual authors do not guarantee a high quality of the whole book.

The typical design of such a publishing venture is that each contributing author gets an outline of the points that the editor(s) consider(s) important. Usually the outline for a book dealing with general presentation and assessment of (adult) educational phenomena consists of an historical overview, major theoretical perspectives, structure, organisation and legislation, government policy, current problems, organisations and persons, and an evaluation of research and scholarship.

Illustrating the “motorway” pitfall is a book entitled, *Perspectives on Adult Education and Training in Europe* (Jarvis, 1992). It covers “leading scholars’ perspectives” (p. XI) on adult education and training in their own countries. Each contributing author received an outline of the points that the editor considered important. However, some of the authors went so far in presenting their own perspective, that the editor complained that “some of the emphases here reflect the subjective interpretations of the authors” (p. 405).

It seems that common to studies which qualify as “motorway” pitfalls is an editor’s/editors’ belief that having the same structure of chapters will secure their comparability. Authors of case study chapters are usually obliged to follow a rigid organisational format. Notwithstanding, sometimes a common ‘structure’ consists of merely similar headings and sub-headings for all case study chapters, and does not necessarily provide a framework for the content. This exact pitfall can easily emerge when the same structure is applied to describe highly centralised and uniform(ist) educational systems, as well as federal states’ systems with decentralised and diversified provisions. Clearly, a commonly employed outline for description does not, or cannot, constitute a component of comparability on its own.

It is not unusual that some contributions in a collective book are better than average, while others are worse. The problem lies in: (a) how close the contributing authors followed a predetermined format of the publication, and (b) how much the editor’s/editors’ conclusions were actually derived from the submitted contributions.

A book entitled, *Changing Pattern of European Family Life* (Boh et al., 1989) can serve as a good example, illustrating an original approach to a studied phenomenon and an accurate procedure applied in a research enterprise. It is not a simple set of texts from different contributors asked to write on specific topics. It is rather a collection of four chapters containing individual sections summarising work conducted in and reported by research team members from fourteen
It would be a *contradictio in terminis* to speak about a positive example of that pitfall.

**Conclusions**

A substantial number of ‘comparative’ publications have appeared over a period of time. Several books studied for this article corroborate the fact that a success of multi-national and ‘multi-authored’-enterprises depend on researchers’ competences as much as on a qualified, sensible and thoughtful organization of the research project.

The belief (and trust) that a common outline (common to all contributors) serves as a guarantee to achieving expected aims of comparability and comparisons of the investigated phenomena, is unjustified. A much more significant foundation to the success of high quality research undertakings is apparently a case study’s author’s/authors’ direct and deep involvement, necessary from the very beginning – in designing the whole project, and in making decisions on an outline for all – as well as the current/constant involvement of project leaders in the process of writing ‘national profiles’ or case study reports.

Despite a few positive examples, astonishingly, many books demonstrate the difficulty of arranging genuinely collaborative international study. Chris Duke (1996), one of the most experienced researchers, wrote about his own experiences in multi-national research projects in a review (published in the Studies in the Education of Adults, 28(1), 121-122):

> the road to real understanding and dialogue between colleagues, countries and systems proved long and slow; only after more than two years was collaboration widened to share common frameworks and methodology with partners in other countries.

Similar testimonies are reported in ISCAE volume 1 (Blais, 1999), or in the present volume (e.g. Henschke).

If an editor(s) do(es) not or could not wait until this ‘critical mass’ is achieved, the whole undertaking might result in academic failure. It is a regrettably common feature that in many comparative studies the relevance of comparability is left up to the reader.

A customary perception is that some specific comparisons can be usefully made, e.g. of the structure of formal education, or the methods of financing training. However, the key features and ideologies of education in a particular country tend to be so deeply rooted in a specific political and cultural structure that even explaining seemingly well-known concepts and practices can be difficult, not to mention the complications involved in a reasonable comparison between them. This standpoint has a long-lasting impact on comparative studies in the social sciences. It constitutes the foundation for a widespread belief: that when comparing two rather similar societies, there is a chance that a close and specific comparison will elicit not general rules, but rather a sharper sense of what determines studied phenomenon in both countries. However, in this sense,
such a study is contrastive rather than comparative, *i.e.* cross-national rather than supra-national.

What is, and should be expected from comparative studies is that they will not only focus on similarities between studied phenomena but also on differences, especially those which derive from unique historical developments, different cultural settings, and various political systems. It is, and would be necessary to understand the cultural, economic and social forces working within each society and the way they influence education. Researchers who succeed in avoiding pitfalls and overcome obstacles can themselves, along with their readership, benefit from the real virtues of comparative studies; for comparisons may sometimes help not only in determining similarities and differences, but can also contribute to identifying forces which initiate studied phenomena. By using comparative methods, researchers can draw their conclusions with more confidence. If not, we will inevitably continue to suffer from the dangers of misinterpreting findings due to obstacles and pitfalls, grounded in ignorance, founded in cultural, social and political contexts.

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**Obstacles and Pitfalls: Inherent and Self-styled Dangers…**


**Books assessed for pitfalls**


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Learning the Arabian or the American Way?
Negotiating Divergent Cultures and Education Systems

Introduction

Comparative and international educational research is interested in a world of unceasing change, and “challenges us to think broadly about the link between local practices and global issues and to explore the overlapping values and social systems that underpin the educational enterprise itself” (Hayhoe & Mundy, 2008, p. 1). Comparative Education really does come into its own in “analysing and demonstrating the contextual idioms which still add up to educational distinctiveness in any one place or time. Comparative Education is paramount in demonstrating and assessing the dynamic of change brought about by the interplay of technological and cultural development with existing educational practices and assumptions” (King, 1965, p. 159).

It has also been argued that comparative adult education changes, educates, and transforms the person undertaking the comparison in addition to informing the reading audience. More clearly, intercultural experience and discourse transform attitudes and values, leading to a greater mutual understanding of differing ways of life and learning, reducing the fear of the strange (Reischmann, 2008). “These changes go beyond ‘knowing’ and ‘using’ and include a basic personal transformation: The international-comparative perspective assists to overcome one’s own ethnocentric blindness (p. 22).” In light of the purposes of comparative and international research, the aim of this paper’s authors was to leverage systematic inquiry into personal experience and competing cultural perspectives as a window to view the micro and macro-level cultural differences between the Kingdom of Saudi Arabia and the United States, rendering them both more and less “strange” to one another.

Since September 11, 2001, the perceived dichotomy between the Islamic East and the West has seized westerners’ collective imagination. Some strands of conversation in the West about gender and Islam are appropriately nuanced and shed light on the diversity of experiences and practices within Eastern cultures, while many other depictions are much less sanguine. Many Western interpretations of Eastern cultures are approached from a position of “intellectual privilege”, capitalizing on Western cultural sensibilities in order to promote political and ideological images of Eastern cultures for Western purposes and gain. A comparative approach between Eastern and Western
cultures must be approached with great caution, as Marcuse (1965) warns us of repressive tolerance, and the risks we run of reinforcing preconceptions and stereotypes, and unwittingly reinforcing privilege and hegemony when presenting “diverse perspectives” as a mere token of “inclusion”. The authors of this paper do not take this challenge lightly, prudently proceeding in hopes of not reinforcing Western, privileged perceptions of Saudi Arabian culture, but rather challenging them at both micro and macro levels.

Background
Saudi Arabia was declared a unified Kingdom in 1932 by Abdel Aziz ben Saud. As the custodian of Meccah and Medinah and Islam’s holy book The Qur’an, Saudi Arabia as a country is considered the “keeper” of Islam as a religion, a great responsibility in preserving the Muslim faith. Basic law of government and education are centered on Islam, with the purpose of conserving a society and culture of faith. In its early years, the Kingdom of Saudi Arabia was a relatively weak economically until the discovery of oil in the 1930s and the oil boom of the 1970s. With this boom came the development of housing, schools, and universities, and the transformation of Saudi Arabian society.

Presently, Saudi Arabia is one of the richest countries in the world and a major political and economic influence which has ushered in a great amount of social change. The education system in the Kingdom of Saudi Arabia has also been under great reform for the past 60 years. Public schools were established in the 1930s, but it was not until 1951 that an extensive program of publicly funded secondary schools was initiated. In 1961, education for females was mandated, and by 1963 girls’ education was available at both the intermediate and secondary levels. The first university, known as King Saud University, was founded in Riyadh in 1957, and was the first university in the Arabian Gulf region. Within a very short time span, 7 universities and 78 colleges were established. A national organization for technical and vocational training was created in 1980, to accommodate the kingdom’s increasing needs for specialized technical training. The number of Saudi students who studied abroad was very high until the early 1980s, when scholarships were curtailed, but as of 2005, Saudi Arabia has newly begun to support students with scholarships to study abroad, and through this program, thousands of men and women have earned doctorates in Western universities. From the early 1980s onward, education has expanded rapidly at all levels in the country. Saudi education must be understood within this context of rapid expansion and modernization. It is suggested (Onsman, 2011) that more than 13 billion dollars are invested in education a year, and more than two billion are spent annually on higher education. The goal is to develop a competitive education system and to lead educational development in the region. Education in Saudi Arabia is the quintessential picture of globalization processes meeting local social structures, cultures, and beliefs.

Saudi education programs embody Shari’a, and the purpose of education is to instill a particular vision of the moral and religious life in Saudi society. One of the distinctive characteristics of education in Saudi Arabia is the separation of male and female education, where the system treats the sexes differently based on their different societal social expectations. While this is often critiqued in the West, gendered and religious practices have also historically informed Western education systems, and even presently inform how men and women have been/are educated and trained. It is these two major differences in educational systems, the separation of male and female students and faith-centered curriculum, which also serve as the primary social dimensions that influence individual experience for Saudi students, both male and female, who are enrolled in US institutions of education. It is at the intersections of the expansion of Saudi education, Saudi student mobility, and the personal experiences of Saudi students in the West where this paper begins.

Methods
In this paper, the authors provide a brief summary of an autoethnographic project that was completed in the spring of 2012. The interactions between the self and others in a culture, and the interactions between an individual identity and various cultures, serve as the foci of autoethnographic research: the autoethnographer is interested in the spaces between individuals and the cultures in which they participate, and the tensions created in between (Muncey, 2010). The auto in autoethnography takes up the personal views and experiences of individuals, while ethnography takes up the facets and dimensions of collectively defined identities, or cultures. “From this individual’s point of view, self is the starting point for cultural acquisition and transmission” (Chang, 2008, p. 23), and the individual becomes the basic unit of culture, intercultural experience, and comparison—a natural starting point for building international and comparative perspectives. Autoethnography links two common approaches in comparative research (Reischmann, 2008), sojourners’ narratives of intercultural experiences, and the more systematic descriptions and comparisons of cultures, relating and theorizing the two in relationship. This methodological approach seeks to describe and methodically analyze personal experience in order to understand cultural experience in comparison (Ellis, 2000, 2004).

The application of autoethnography as the methodological framework for this research rests on four foundational assumptions (Chang, 2008): “(1) culture is a group oriented concept by which self is always connected with others; (2) the reading and writing of self-narratives provides a window through which self and others can be examined and understood; (3) telling one’s story does not automatically result in the cultural understanding of self and others, which only grows out of in-depth cultural analysis and interpretation; and (4)
autoethnography is an excellent instructional tool to help not only social scientists but also practitioners… gain profound understanding of self and others and function more effectively with others from diverse cultural backgrounds” (p. 13). Autoethnography, then, offers a systematic and rigorous method of self-inquiry that can shed light on personal experience as well as broader cultural similarities and differences.

**Conceptual Framework**

Talk about Islamic East-West relations at points of cultural juncture is often framed with regard to the Islamic belief structure, or with the gender oriented social organization of society. The purpose of this paper is not to discuss Islam and Saudi Arabian gender norms from a Western point of view, nor to reinforce Western preconceived notions of Islamic culture. *Kyriarchy* (Schüssler Fiorenza, 2009) is a term that describes the intersectionality of dimensions of identity as they are experienced by any person, where in some contexts the person may be advantaged, and in other contexts disadvantaged. Schüssler Fiorenza (2009) discusses how different dimensions of identity become nodal points of experience, through which other dimensions of identity are also experienced. These nodal points of identity then inform identity and experience, and one can assume that these nodes also shift and are experienced differently when a person moves to another culture. Upon entry and participation in another culture, the primary nodes of experience may shift. For example, in Saudi Arabia, being male may be the nodal point of experience through which the other identity dimensions are also experienced, but upon moving to the US, the primary node of identity and experience may change to one’s faith, as that perhaps becomes the node that most dominantly influences the experience of the other dimensions. For a Saudi woman, the node of gender may be the primary node through which identity is experienced at home, but even if gender remains the primary node of experience in the US, the position of being a woman of color and a Muslim in a US American context necessitates shifts in how a person sees and understands herself.

Based on the outlined methods of autoethnography, and the notion of kyriarchy, two stories of Saudi Arabian students are shared in this paper. Sarah’s story is told through the identity dimension of gender and her accompanying transformations, and Obaid’s story is told through the identity dimension of his faith, and how this has impacted his learning experience. The authors employ pieces of narrative from personal experiences in both the Kingdom of Saudi Arabia and the United States to highlight the tensions between the two cultures as experienced by individuals, as well as to explore the transformative benefits of gained cultural and linguistic knowledge in comparison. Through the telling of individual stories, the authors present a broad brush stroke picture of some divergences between cultures and educational purposes. And finally, the methodological approach of autoethnography is briefly discussed as a tool for comparative research in the field of adult education.

**Illuminating Narratives**

**Gender: Sarah’s Experience**

My experience of going abroad to the US for my studies, both prior to and following my departure, has been informed by my gender. As I was completing my Master’s degree in Education, my parents supported me and my goal to study abroad in the United States, and they encouraged me to enter the initial process for a state sponsored scholarship. While I was in this process, we began receiving many email messages from my relatives, friends, and neighbors. One of my friends wrote: “Studying abroad alone is difficult for a male, so it would be so hard for you. Listen to me, and forget this idea. Because you are here, you do not understand my words. Please, listen to me and forget this idea. I love you and do not want to see you suffer—Sarah! Sarah! Are you serious? Or you are just kidding us?” exclaimed one of my relatives in a phone message when she heard I had decided to study abroad. Their comments and concerns made me question myself and my dreams, and I wondered if something was wrong with me. I felt confused as I experienced the tension between my dreams and my family’s and friends’ opinions.

My parents also had bitter conversations with some of our relatives. I can recall one of my relatives saying, “if you are good parents, you should protect your daughter”! There were some dialogues which I could not get out of my mind, such as the part of an argument between my father and my uncle. My uncle: “Your daughter cannot stand alone; because everything she wants we do it for her, so she cannot take up the responsibility of doing everything for herself.” My father: “You do not perfectly know her.” My uncle: “However, she will face a different culture and custom, so people may not accept her as a Muslim woman.” At the last statement, I could not bear to listen to the rest of the conversation, and I became wrought with worry. However, there were friends who also supported me. One friend wrote, “I know you, Sarah. You can do it, and this is your dream. Therefore, do not listen to anyone else, just keep going!” My siblings also supported me. My brother said to me, “You want to improve yourself, you want to become a doctor, you want to improve the Saudi family’s and friends’ opinions.

My parents also had bitter conversations with some of our relatives. I can recall one of my relatives saying, “if you are good parents, you should protect your daughter”! There were some dialogues which I could not get out of my mind, such as the part of an argument between my father and my uncle. My uncle: “Your daughter cannot stand alone; because everything she wants we do it for her, so she cannot take up the responsibility of doing everything for herself.” My father: “You do not perfectly know her.” My uncle: “However, she will face a different culture and custom, so people may not accept her as a Muslim woman.” At the last statement, I could not bear to listen to the rest of the conversation, and I became wrought with worry. However, there were friends who also supported me. One friend wrote, “I know you, Sarah. You can do it, and this is your dream. Therefore, do not listen to anyone else, just keep going!” My siblings also supported me. My brother said to me, “You want to improve yourself, you want to become a doctor, you want to improve the Saudi family’s and friends’ opinions.

When the flight attendant announced, “Now, we are in the U.S.”, I felt like I wanted to return back to my country, because I did not know where I was going, and could not speak English. When I arrived at the Washington airport, I just followed people and used sign language and a few words. After I had arrived to the town and lived by myself in an apartment, I faced a lot of difficulties which
included struggling with English, feeling lonely and homesick, finding an appropriate food, and changing my identity.

My first experiences were characterized with feelings of disappointment and frustration. Even when I had the chance to spend time with Americans, I did not understand them or their customs. They were very kind, but I was sad and wanted to cry because I did not understand them. It was difficult in the beginning. I was never comfortable, and people did not understand me. I avoided going places, because I knew I could not explain myself or what I needed. I only ate fast food, because I could not find any food to my liking. I often went to the store, only to come home empty handed and disappointed.

After several months, I felt even more lonely and homesick, especially during the holidays like Thanksgiving and Spring Break, or when I received emails or phone messages from my family. In my journals, I wrote some simple feelings:

When the moon is full and its light is vivid
When the stars communicate with each other
I feel that I need someone who can listen to me
I need someone who understands me
Then the stars send to my heart a hidden ray
and say we are here, we are with you
So I realize that I would find this person who I was looking for
I know as well as looking about me
Be close

It was during these breaks where I felt the most alone and isolated. Sometimes my family sent me messages like, “Right now, our parents and siblings are sitting in your room and we are talking about you. We also are drinking the coffee which you like and watching television. We just miss and love you. Take care.” Sometimes I felt as though I could not stand being apart from my family any longer.

But I also grew with my experience. At home, I had not been responsible for many things and had never paid an electricity bill, water bill, or for rent, because my family had always taken care of things. But when I came to the United States, I had to do much more than that, which helped me become more confident in myself and discover my own value. For example, in the English center, I helped new international students find and understand what they needed. Sometimes the school asked me to translate for Arabic students or employees and to help them to correctly understand each other. I also showed students where they could find appropriate food. With both international and Arabic students, I showed them some important places such as the health center, bus stop (and explained the schedule), and library, and sometimes I described my experience of learning English and shared my strategies for studying.

Even though I had learned many new things, I sometimes asked myself who I am, especially after I was in contact with my friends or family. I used many English words while I was communicating with them, and my language seemed confused. Also, when I returned to my country (especially the first visit), many people who know me told me that “you seem like American people.” I continuously caught myself “acting like an American” and didn’t know where I belonged exactly. However, I felt extremely proud when my family told me that there were some girls in my area who are also studying abroad because I have opened the door for them. To clarify, through my decision to study abroad, I believed that I had a different perspective which might lead me to achieve a big goal, and I have overcome many obstacles in order to follow my dream. I believe this experience has transformed me. I did what women traditionally do not do, such as stating that my dream to study abroad was bigger than other people’s emotions, desires, and customs. This is similar to what Mezirow (2000) mentioned about transformative learning as changing a frame of reference, which is inclusive of two dimensions: a habit of mind and resulting points of view. As I renegotiated my worlds and social expectations, integrating my new selves while parting with and letting go of some old selves, I learned to see and understand myself in new ways.

In taking on the responsibilities that came with my studies in the US, I became a Muslim woman who can navigate in two worlds. I have grown beyond my social expectations at home, and have influenced other women, and I continue to grow and change as my experience of dual cultures deepens. I understand my culture in a more profound way, as I see it through different eyes, but I also understand this new culture in ways I could not see in the beginning. Being a Muslim woman has informed all of these experiences, as have the expectations others have of me as a Muslim woman, both in Saudi Arabia and the US. I believe I have challenged these gendered social expectations, both individually and socially. I am not a woman confined by my gender, but rather an empowered woman who is redefining my understandings of my gender through multiple lenses and experiences. This is my transformation.

Faith: Obaid’s Experience

When I decided to pursue my studies in the in the United States, I still remember my brother’s advice, "If you have to be motivated and willing to change, go, otherwise you should stay." When I came to United States for the first time, it was very hard for me because I did not speak the English language; also, the culture and lifestyle were different from my country. A month, after arriving in the United States, I wrote in my journal, ‘Next month, I will go back to my country and never come back.’ When I decided to return to my country, I was puzzled because people in my culture considered my return to be a failure. At that time, I felt more than just pain. I stayed.

The power of language is probably the most effective way of reducing or eliminating the feeling of alienation as well as the negative impact of culture
shock. I am a social person by nature and I like to communicate with people, but limitations with the English language made me feel shy and made people regard me as a shy person. After several months, I began communicating with people around me. I spent time with American people and started to learn about the United States culture. One day, one of them said to me, “Obaid, I thought you were a shy person but you are not!”

After some months of studying in an English program, my language was getting better. I could communicate with people around me, and I was getting to know some friends. I was studying very hard and my teachers encouraged me. They told me each semester, that “Obaid you learn very fast.” I did not participate much in class, and my teachers wondered about that. They did not know the reason, but I did. In Saudi Arabia students normally do not talk very much in the classroom. In general, students just listen, and the teachers say everything. This classroom expectation was a major change for me, and I still struggle with the American expectation to voice one’s opinions and beliefs.

Our educational system in Saudi Arabia, in particular, and the Arab countries in general, relies on studies in faith and mobilization of memory, which limits creative thinking. For example, in the first semester of my language learning, a teacher asked students to read a short story. I memorized the whole story, and I was feeling great about it. The next day the teacher asked the students to write one or two paragraphs about the story. My two paragraphs were exact copies of the story. The next day the teacher accused me of cheating. He asked me to write the two paragraphs again in front of him. When I did, he laughed and told me that in the United States the system considers what I did as cheating. At that time I realized I can no longer simply recite text, and that I should change my learning patterns, so I could learn more effectively. I sent to my brother an email, he was in high school at the time, and I told him please not to rely only on rote memorization.

The education system in the United States also seems very flexible. For example, I can email my professor if I want to ask them questions, and they usually respond to me. In my country, even if I know a professor’s email address, sometimes they do not answer. In addition, outside of the classroom it is hard to communicate with them. However, the atmosphere and environment of the education system in the United States is comfortable and enhances learning. For example, at any time I can go to the university campus and study. In the US, I have adopted the university campus as my home and my personal refuge. I spend more of my time studying there. In my country, the university campus closes with the end of working hours.

Also, in Saudi Arabia we do not have school on Friday. This day is a very important day for Muslims and more significant and beneficial than any other day of the week. When I came to America, I found it difficult to attend the classroom on this day. Sometimes, I did not want to attend class, not because I wanted be absent, but sometimes I forgot because as Muslims we always get ready from early in the morning for this day. But after having been in the US for several months, I adopted this situation of class on Fridays. When I returned to Saudi Arabia, I even found myself considering Friday to be a work day. After I returned to my studies in the US, my mother sent me an email, writing “Obaid, do not lose your religion, just two years and you forget this important day. Your religion is the most important thing, if your studies in the United States make you to forget your religion, then please come back.” These experiences have challenged me, and how I view education and my faith. I often feel that the social expectations in both cultures do not agree, and I have to find myself somewhere in the middle.

The second semester I was enrolled in my doctoral program was a big challenge in my education. In the Foundations of Educational Research class, I was initially lost, not because of the limit of my English language, but because of my beliefs. In my country, if you ask a person what they believe, he or she will say the faith Islam or the Holy Book. In this course, we studied many educational philosophies, such as pragmatism. In our culture, some of these philosophies conflict with our religion, from which our education stems. At the beginning of this course these philosophies did not make sense to me. I was wondering how these philosophies could possibly make sense to American students. In our education system we study some of these philosophers, but we do not believe much of the information on them, because some of them are contrary to our religion. When faced with these new philosophies, I sometimes felt like I had lost my identity and my spirit. At the end of the course, I realized the importance of these philosophies, and how they could guide us to effective teaching and research.

I consider my studying abroad in the United States to be a major turning point in my life that has opened my view. This shift is not only in the academic side, but also in the side of behavioral, social, and cultural influences. For example, after I started speaking the English language, my personality has changed; I have become a more social person and my learning has improved. I have adapted to the education system in the United States, and have tried to learn in creative ways and not just try to memorize everything. My view of things has become more accepting, for example of educational philosophies. In addition, I have adapted to many new situations, and am learning to negotiate my cultural identity within the context of Western education. According to Gu, Schweisfurth, and Day (2010), international students’ intercultural learning experiences are both transitional and transformational and necessitate identity change to a greater or lesser extent. Between Sarah’s experience as a Saudi woman and mine as a Saudi man, we attribute some similar changes such as psychology, behavior, and identity to these experiences, and recognize that they have been filtered through our gender and religious norms. However, we also...
realize the challenges of negotiating competing ideas, beliefs, and social expectations, and wonder how these will continue to be transformed, for us personally, and within the evolving Saudi education system.

**Analytical Summary**

What do these examples mean for international comparison in general? These short stories highlight some of the differences between social and cultural expectations, and purposes for education. One of the major challenges in completing comparative educational scholarship between “Eastern” and “Western” cultures is the tendency to discuss another country’s sociocultural dimensions through Western understandings. While many of these social expectations and beliefs do differ greatly, it is very difficult to conduct comparative studies without falling into the trap of evaluating education systems by Western cultural sensibilities. As seen here, the Saudi education system is subject to global trends as much as any other country, and has been responding with rapid expansion and educational reform. The experiences of the Saudi student-authors of this paper serve as evidence of these. To critique each system according to Western “norms” is to commit a logical fallacy in some terms, not to mention Western education systems are themselves rapidly evolving and being reformed and may not be the gold standard either. This leads us to the questions of, when pursuing educational research in comparison, by whose standards, whose beliefs, which values, for what purposes, and to what end do we compare education systems?

While gender and faith were nodal dimensions of identity that informed both Sarah’s and Obaid’s experiences, they have found ways to learn and change in spite of the social expectations others have held of them (in both “Eastern” and “Western” cultures). Autoethnography offers the opportunity to explore macro level social customs and understandings through the eyes of individual experience. Methodologically, this allows us to see how shifts and changes simultaneously occur at both micro and macro levels, and how each level is influenced by the other in their flowing states of change. Global processes continue to contribute to the rapid evolution of education in Saudi Arabia, enabling student mobility and the opportunities for individuals to grow personally, which then feeds back into wider systemic changes. And as for the charge to international and comparative education researchers to challenge readers to “think broadly about the link between local practices and global issues and to explore the overlapping values and social systems that underpin the educational enterprise itself” (Hayhoe & Mundy, 2008, p. 1), we find the methodological approach of autoethnography very useful.

**Resources**


The Freirean “Andragogy” and Orality in Indigenous African Education: a Framework for Comparative Education

ABSTRACT: Almost all learning, critical theories, and process models that embrace the humanistic perspective in adult education are connected by their emphasis on dialogue. Dialogue in education, and especially adult education, is a platform that allows the learner’s experiences to be important factors in the process of knowledge creation. All of Paulo Freire’s ideas and practices are couched in the dialogue that establishes learners as co-investigators and co-creators of knowledge. Freire establishes dialogue as the best platform for “helping adults to learn.” In traditional African education, dialogue is a non-negotiable component of lifelong learning. Dialogue within its traditional usage includes interaction with the ancestors, the entire community, and the natural environment. The unwritten nature of lifelong learning in traditional Africa makes dialogue the center of life and learning in every community. Dialogue as the literary element in indigenous African education is summed in the concept, Orality. This paper establishes Freire’s philosophy as andragogic and dialogic and compares it with Orality in indigenous African education. The paper uses the analysis of the comparison to argue for a more integrated approach to comparative adult education. The paper concludes by offering the analysis as a possible cross-cultural framework for comparative education that recognizes and is responsive to indigenous pedagogies.

Keywords: Africa, Andragogy, Freire, indigenous, Orality, comparative education

Introduction

In recent years, I have tried to slant some of my research and writing towards lifelong learning in indigenous Africa. As I try to present ideas and perspectives from the traditional worldview, I have always faced the problem of connecting the circular and holistic indigenous worldview to the dominant and more documented linear thought pattern. Any individual that attempts such a task of crisscrossing ideas between two distinct and contrary (sometimes contradictory) worldviews must be prepared for the possibility of losing substance in translation. Anyanwu (1983) argues that whereas the linear and scientific notion of causality is interested in the how question, the African mindset is interested in the “why aspect of everything.” He borrows the “Principle of Synchronicity” to explain causality within the holistic framework. Citing another source, he defines the principle of synchronicity as “a mental attitude which took full
account of that peculiar interdependence of objective events among themselves as well with the objective (psychic) state of the observer or observes” (p. 68).

The nature of most indigenous societies is such that life and living provide a revolving but coherent connection between all fibers of society. In such a setting, life, as day and night, is repetition. Repetition, within the holistic worldview, gives meaning to existence and all other things that make life meaningful. The belief in reincarnation for instance, is a repetition of life and death. The African name Babatunde is a good example. Babatunde is the name given to a male child born after the death of a male elder in a family and it simply means “our father has return.” The father returning is indicative of the fact that there is a constant link between the ancestors, the unborn, and the living. The traditional African mode of knowing combines the spiritual and the physical because both are perceived as “a unitary world of aesthetic continuum” (p. 105). In spite of the divides between the holistic and the linear worldviews, it is possible to draw on their similarities and even differences to create a platform for intercultural comparative adult education. It is not possible for me to present a comprehensive and full paper on this proposal but I hope that the sketch presented in this piece will form the basis for a full paper and dialogue on the subject at a later date.

The Risks of Intercultural Comparative Adult Education

My approach in this paper is to call the definition and understanding of comparative adult education into question. My call does not go anywhere close to what Newman (2012) did with his piece that presented “some mutinous thoughts” (p. 36) on transformative learning. My argument in this paper is to invite the experts on comparative adult education to consider definitions that will make comparative adult education in the 21st century such that it is, in line with the Belém Framework for Action (2010), “responsive to indigenous people, rural populations and migrants” (p. 22). I was reminded by one of the reviewers of my abstract that “comparison means to explicitly identify and analyze similarities and differences in two or more countries and includes the attempt to understand why differences and similarities occur and what they tell us about adult education in these countries (emphasis mine)” Another comment from the reviewer(s) is “indigenous and Orality are the two main concepts in his (mine) chapter published in ISCAE second volume…”

The reviewer(s) comments above take us back to my earlier clarification on the difference between the linear and holistic frameworks. The definition of comparison along countries tends to ignore the peculiarities of multi-ethnic and multi-lingual countries with indigenous populations. The dangers of continuing along this definition, especially in the age of globalization, include annihilating what Giroux (1985) ascribes to Freire as the “cultural powers” of indigenous populations in such countries (p. xxi). He further presents cultural powers in Freirean terms as the foundation for the “social and historical particularities, the problems, sufferings, visions, and acts of resistance, that constitute the cultural forms of subordinate groups” (p. xxi). I adopt this understanding of cultural powers and argue that it presents some beacon of hope for indigenous people to have a sense of belonging to the global community and to harvest some of the dividends of adult education. For comparative adult education to insist on “comparison” along national boundaries is to commit existential fallacy that draws particular conclusions from universal premises. In this case, using the universal instances of linear understandings to draw particular conclusions even for indigenous people with holistic mindsets is pure existential fallacy. Furthermore, to insist on the universal umbrella of comparison is to impose what Bron (2008) calls “pitfalls…ignorant assumptions…” He uses the excellent example of when a research is “not aware of or ignores the fact that an American high school does not whatsoever equate to a German Hochschule, or a Swedish högskola, or a Polish szkoła wyższa” (p. 66). To insist that ideas from indigenous frameworks must be compared on the “countries” basis is to impose “self-inflicted misinterpretations” (p. 66) on comparative adult education in the 21st century.

Indigenous and Orality were prominent in my comparison of lifelong learning in traditional African and Native American indigenous education. These same concepts are prominent in my other publications that touch on the “cultural powers” of traditional African people without repeating or diluting the quality of the contributions to dialogue. Orality was developed as a concept to capture the unwritten body of knowledge that exists within indigenous societies and it is the equivalent of “literary” in the western worldview. Within this understanding, I can present a “book” on proverbs from the oral literature of indigenous African pedagogy. In addition, the circular nature of the indigenous society compels meaningful repetitions that say and use old things in new ways to make useable new meanings.

Intercultural comparative adult education has its risks in spite of which it can draw on similarities and differences and use the analysis of such differences and similarities to create new meanings. It is in this sense that “comparing the incomparables” is worth the risks. I present a sketchy summary of the paper below and I hope to develop all the arguments in a full paper later.

Orality and Freire’s Andragogy

In this section I offer a sketch of my line of argument in establishing a basis for comparative analysis of Paulo Freire’s ideas and Orality in indigenous African education. First, I establish Freire’s dialogic process that culminates in conscientization as being Andragogic. Second, I argue that Orality, as the absolute medium of education in indigenous Africa, and indeed in all indigenous societies, is sustained by horizontal dialogue across all areas of human activity.
in any community.

Paulo Freire’s works have possibly been interpreted in millions of ways across the globe by those who subscribe to his ideas and their effectiveness as well as by his detractors. Either way, it is an incontrovertible fact that Freire’s work and influence have implications beyond many borders of human existence and contexts including cultural, social, and geo-spaces of education.

The core of Freire’s pedagogy is the process of conscientization which is the objective of his liberating education. His process is one where each individual unearths the reality of her/his world in dialogue with others with the world as a mediating factor.

Freire’s philosophy underlines horizontal dialogue as a sine qua non for liberating education and establishes empowerment as both its means and ends. Freire’s etymology through its coinage and popularity in adult education by Malcolm Knowles, is a celebration of the learner as the principal investigator and creator of knowledge. Dialogue is at the center of his process. Mayo (2007) affirms that dialogue and “the pedagogy of question” are the areas of emphasis in Freire’s process of problematizing knowledge (p. 107). It is within these understandings of the centrality of dialogue and the imperative of the learners’ context and experience that Freire’s Pedagogy of the Oppressed is indeed, andragogical, hence the reference to the Freirean Andragogy. I intend to analyze the symmetrical relationship between conscientization and Andragogy in detail with the full paper.

I am always compelled to clarify the fact that traditional Africa simply refers to Africa prior to colonialism and related foreign intrusion. I must also clarify that I use the concepts indigenous and traditional synonymously. In addition, I use them as common threads in making universal pronouncements in spite of the enormous diversity of traditional and contemporary Africa. Finally, that Orality, or the power of the spoken word, is at the core of traditional African education and it presents the learner, context, content, and educator as participants in a lifelong dialogue with the physical and spiritual worlds. Orality emphasizes dialogic power as a guarantee of praxis and individual empowerment through education. It establishes participation, imitation, observation, and other forms of engagement as forms of dialogue with the physical and spiritual communities that form the context of indigenous education. Whereas the spoken word is established as an imperative of this process, it is by no means the equivalent of the total package of Orality. However, it is within the framework of the imperative of the spoken word and its significance to dialogue in liberating learning that Freire’s Andragogy and Orality are used to advance the argument for intercultural comparison in comparative adult education.

Similarities and Differences

In this section I try to draw attention to a few of the lines of convergence and difference in Freire’s Andragogy and Orality in indigenous African education. The first point of convergence is the fact that the world is a mediating factor in both. For the traditional African, Orality implies constant interaction with the world in a holistic way. Freire (2004) too insists that problem-posing education involves “naming of the world” (p. 89). He re-echoes the same views in the last interview he granted 15 days before his death. Torres (2007) quotes generously from that interview for her article entitled A million Paulo Freires. Her quote further affirms Freire’s position that “knowledge is… a process resulting from the continual interaction between human beings and their surroundings” (p. 65) and affirms the imperative of the world as the mediating factor in knowledge creation and usage.

Learning is also problematized through Orality in indigenous African education. The use of problems in indigenous pedagogy is a way of problematizing learning though encoding and decoding complex patterns of words. This same pattern is implied in Freire’s contention that learning is problematized through praxis. Other areas of similarity between the two include the fact that both fall within the humanistic perspective in adult education and learning. Furthermore, both are applicable in formal, non-formal, and informal learning environments. In addition and more importantly, both establish the centrality of the learner as Homo sapiens – rational thinking beings – in the process of knowing. Finally Orality, in spite of its nature is about application just as Freire’s Andragogy emphasizes applied education.

There are several areas of dis-similarity between the two. Freire’s Andragogy was influenced by the political climate and the perceived poor state of education in his context; Orality dates back to the ancestors. In a similar vein, Freire’s Andragogy is copy-righted/authored by him; everyone has the copy right to Orality because the ancestors passed it down to all and anything that belongs to the ancestors belongs to the entire community. Another point of difference is the fact that Freire uses individuals as teachers and oppressors; the other uses the entire community as teachers with no room for oppression as analyzed by Freire because of the fear of the wrath of the ancestors. Whereas Orality by definition and nature is unwritten, Freire’s Andragogy is written and has been subjected to scientific research and critique. A further point of departure for both is that there is a dearth of literature related to Orality while Freire’s Andragogy occupies extensive space in academic literature. There are several other points of difference that will be part of a full paper.

Conclusion

I have tried to argue that comparative education, in definition and practice, has
to update its methodology in the 21\textsuperscript{st} century to be inclusive of indigenous populations that are often sub-summed in comparisons based on the current definitions of comparative education. Another justification for my argument is the need to accommodate comparisons between linear and holistic concepts as frameworks for comparative education in a globalized world where the learning community is a contested concept. I have established Freire’s ideas as being Andragogic and I have used that argument to compare it with Orality in traditional African education and learning. Similarities and differences were used to establish the fact that there is a viable basis for intercultural comparison using Freire’s Andragogy and Orality in indigenous African lifelong learning.

**References**


Work in progress. Comments are welcome; quoting not (yet)

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**Non-formal learning - similar settings, divergent cultures**

**Comparison of Polish and Swedish ENGOs**

**1. Introduction**

Non-formal learning of adults is in focus of this paper. Its characteristic features are: it is organized outside the formal school system, is voluntary, usually short-term, the presence of a teacher (trainer, coach, instructor) is not necessary (cf. Schugurensky 2007:164f). What is important: Non-formal learning is intentional from the learner’s perspective (COM(2001) 678 final).

Adults whose non-formal learning were studied are staff of WWF and Greenpeace - two world-wide environmental organisations (ENGOs). They work in two countries - Poland and Sweden. The empirical material of this study consists of interviews with the staff of WWF and Greenpeace. My questions concerned mainly capacity building of the organization, its educational needs and training/learning activities that has been organized or attended. Language of interviews was English, Polish and Swedish.

I was interested to determine how learning in these two ENGOs was organized?; who did what? But also to learn where did training competences come from? Were there any significant differences in how non-formal learning processes are run in two ENGOs in two countries? Some of these questions are focusing on a phenomenon called social movement learning (SML) - a term that is discussed later.

Polish and Swedish WWF and Greenpeace share with their mother-organisations missions, goals and ways of working and acting. Thus, a starting hypothesis for this paper was that similar organisational settings are present in both country organisations.

My working hypothesis was the following:

Despite many similarities how a given ENGO work is organized, its staff and members do act and learn differently. One possible explanation is a political culture of a society they are living in.

A broad definition of political culture was formulated by Kavanagh (1972) according to which it is a set of values within which a political system operates. Individuals are socialised into a country’s political culture. The underlying assumption is that norms, rules, habits, traditions and belief systems shape the behaviour of citizens. If they have trust in public authorities, there will be a closer relationship between state and society (Askvik et al 2011).
In his influential article, Pye (1968) stressed the importance of history. According to him a political culture is the product of both the collective history of a political system and the life histories of the members of that system, and thus it is rooted in both public events and private experiences. My point of departure was that Poland and Sweden have different capacity for action. Such differences may facilitate or hinder functioning of civil society organizations, and among them environmental NGOs. This has been corroborated by some interviewees:

There are also significant differences between the options available to produce and to influence in different countries (WWF Sweden, Näslund, Feb. 24, 2012).

WWF Sweden’s staff is skilled to make use of the principle of public access to official documents (offentlichteprincipen). Sweden has a strong culture of open government and a relatively easy access to officials and decision-makers. Other countries around the Baltic Sea does not have this easy access. It has happened that WWF Sweden have gotten official EU documents from officers [civil servants], while their colleagues have been refused the same documents from their counterpart. They have the same right to see the documents, but the principle of public access to official documents is more restricted in their countries (WWF Sweden, Näslund, Feb. 24, 2012).

Thus, I believed that Poles and Swedes employed in the same international organizations were in reality working and behaving differently, as different were the conditions of their work.

2. Points of departure

The assumption while preparing this paper was twofold - theoretical and practical one. Obviously I had to subscribe to adult educational theory that would suit best my research (it will be discussed in section 3 below). However, studying educational phenomena that occur in social aggregates, non-governmental organizations, I was compelled to adhere to sociological theories, too.

2.1. Theoretical assumption

Sociological theory that I found most useful stems from Eyerman and Jamieson (1991) and their argument, that social movements characteristic feature is their *cognitive praxis*. Social movements, according to them, do generate new knowledge and, eventually, new worldviews. One of the best examples (and proof) of this assumption are environmental movements. They were often instrumental in pursuing new knowledge about pollution, hazardous chemicals, transport and agriculture impacts on the environment.

As an adult educationist I find some support in North American school of social movement research called resource mobilisation theory (McCarthy & Zald, Oberschall, Tilly). Their studies on internal and external resources that facilitate collective actions appeal to me, as it is similar to my own discipline’s approach.

Due to its emphasis on macro-social perspective and disregard of individual motivation I find less support in new social movement theories (Melucci, Offe, Touraine).

2.2 Practical assumption

Practical assumption, based on my previous studies on NGOs, was that participation in NGO is - also - an educational endeavour. Knowledge and skills acquired in working for the organization, change or strengthen competences and attitudes for those involved in NGO work. Expectations and requirements concerning competences of members and volunteers are steadily growing. Especially when goodwill and commitment are not sufficient in a longer perspective.

3. On learning

Researchers of social movement focused their interests on cognitive aspects of their work and on knowledge generated by them. Even if much was written about cognitive praxis, communities of practice, and alike, learning itself, however, was not investigated. Before I report my provisional results I ponder first on terminology.

Learning, form a psychological point of view, is defined as *any process that for living beings leads to a durable change of capacity and is not caused by oblivion, biological maturing or aging*. For humans this process is ongoing throughout life, whether it be intentional or incidental (Illeris 2008:401). Very often learning is envisaged as only knowledge and skills. However, it does also encompass attitudes, competencies, viewpoints, meaning, insights. For an adult educationist it is important to stress that *it is basically characteristic that adults learn what they want to learn, and have very little inclination to acquire something they do not want, that is, something they do not perceive as meaningful for their own life goals* (Illeris 2008:406).

3.1. Learning: formal, non-formal and informal

Of the three types of educational provisions - formal, non-formal and informal - the latter is connected with social movement learning (SML).

‘Formal learning’ is commonly associated with ‘schooling’ - a chronologically graded system of teaching and learning, structured courses, assessments and certificates. Is typically provided by an education institution with prescribed...
curriculum, explicit goals, assessment mechanisms and certification. Formal learning is intentional from the learner’s perspective.

'Non-formal learning' is an organized teaching/learning activity outside the rigid frames of formal education. Typically it does not lead to certification. It is, however, often structured in terms of learning objectives and time. It is usually short-term and voluntary. There might be teachers (also called instructors or facilitators), and a curriculum with various degrees of rigidity or flexibility (Schugurensky 2007:164). Non-formal learning is intentional from the learner’s perspective.

'Informal learning' is unorganized and often incidental. Informal learning results from daily life activities related to work, or family or leisure. In most cases it is non-intentional.

3.2. Social movement learning - understanding the concept

As a reaction to ruling perspective on learning by an individual, various theories on social learning have been formulated (cf. Wenger 1998, Fenwick 2000, Wildemeersch & Vandenabeele 2007). There is a number of definitions of what is meant by social learning, and what makes learning to be "social". For the purpose of my project, I found the following definition most useful. 'Social learning' is the learning of groups, networks, communities and social systems, engaged in problem solving activities, in conditions that are new, unexpected, uncertain, conflicting and hard to predict (Wildemeersch & Vandenabeele 2007:21).

There are three characteristic features of social learning:

First and obviously, social learning is done in and by groups, communities, and networks. Second, social learning is about social issues. More precisely: it concerns matters of common interest and collective action. Sustainability issues typically belong to this category. Third, social learning implies that, even in the middle of conflicts in views and interests, there is an effort at collaboration and consensus (van Koppen 2002:376).

In my research I subscribe to two tracks of thoughts: the one that conceptualize social learning as individual learning that take place in a social context as well as to that which sees social learning as a process of social change in which people learn from each other in ways that can benefit wider social-ecological systems (Reed et al. 2010:2).

Social movement learning can take place in two different forums. Through their actions social movements attempt to persuade and educate the general public, decision makers, other target groups, for the sake of their cause. Thus the first forum lies outside organizations; people learn as a result of the actions undertaken by them.

The first forum is closely connected with awareness raising activities of many environmental NGOs. Promoting or explaining a particular issue - be it an existing problem, or possible solutions, or a need of action. This is the most frequent work of educational character undertaken by ENGOs. Other areas in which ENGOs act "educationally" are when they address donors explaining their work, or media when trying to present their positions.

The second forum at which social movement learning occurs is the movement itself, within which its staff, members and volunteers improve their knowledge and learn organizational skills. They are often passed from one person to another through observing and following. Or a knowledge transfer occurs more structurally, through workshops and seminars.

4. Findings

Environmental non-governmental organizations are often called "learning organizations", and are, undoubtedly, knowledge-intensive organizations. To campaign for environment, to challenge decisions (be political or economic), to propose own solutions all these involve learning about ecology, botany, biology, chemistry. As well as on public relations, negotiation strategies and alike. As Loeber, van Mierlo, Grin, & Leeuwijs (2007) correctly observed sustainable development implies a need for learning ... the learning processes ... are more than mere 'joint fact finding' exercises, and involve processes of value judgment (Loeber, van Mierlo, Grin, & Leeuwijs (2007:84).

However, in the case of ENGOs that work without members necessary knowledge, often at a university level, is secured through employment of staff with relevant competencies:

environmental organizations ... are generally well equipped with good knowledge of both the issue and the process. They have all the expertise needed in order to be a trustworthy advisor and they are often giving well-grounded and rational suggestions (Greenpeace Norden, Bengtsson, March 8, 2012).

To be resourceful within the process you need expert knowledge both in the practical issues at hand, as well as in the process and management system in itself (WWF Sweden, Merriman & Thoreson, Feb. 22, 2012).

4.1. What was learned …

A common feature of the two ENGOs presented here is the lack of members. Despite significant differences between them, both made a conscious decision not to work through members. This had a direct impact on what kind of training their staff underwent and how it was organized.

Analysing topics of courses given or attended by studied ENGOs one can conclude, that their diversity was rather limited. Content-wise they can be divided into three categories: (a) environment oriented (updating or upgrading existing "relevant" knowledge), (b) media training, and (c) negotiation and/or
advocacy training.\(^2\)

Most important, and most valued, were opportunities to learn latest developments within the area of responsibility of an individual employee. Be it scientific, legislative, political. This could be seminars or lectures given on sustainable consumption, transport policies, petroleum pollutant spills, eutrophication, blue-green algae. Topic and type depended on personal interests, aspirations, needs.

Scope of the courses outside the main domain of work span from working with media, creating web-pages, raising funds, conflict management. In time WWF and Greenpeace employees amassed a set of know-how that enabled them to pursue their organizations' missions. Interestingly, what comes out of all three interviews is the fact that contents that were learned in courses given by others were often similar to topics discussed during internal workshops.

Learning outcomes are often of direct relevance for those who partook in learning situation. Nevertheless, some results contribute to a long-term personal development, too. Among social skills that use to be learned through active participation in NGOs are diplomacy, persistence, consistency, public speaking.

4.2. … and how?

Even less diverse then content were ways in which the knowledge and skills have been obtained. With ENGOs that do not have members three main learning opportunities were courses, workshops and information meetings. Sometimes e-learning is chosen instead of more traditional form. The use of Internet, and of internal (requiring log-in procedures) web-sites is a growing phenomenon. Usually Polish and Swedish Greenpeace and WWF staff attended relevant events organized and hosted by other NGOs, specialized firms or state authorities:

In this fashion, we learn while attending conferences and courses organised by others. Upon certain occasions, we work in a similar way, i.e. by holding an event for the needs of other organizations (WWF Poland, Tymorek, May 17, 2012).

Equally important, though less frequent, is a knowledge transfer within own organization: Sometimes we have internal exchange of knowledge. When someone goes to a workshop or has a certain knowledge - tries to transfer it to other co-workers (Focus Slovenia). Some organisations are better equipped to do so than others. For instance WWF Poland profits from 50 years of experiences collected by WWF International:

Whenever we initiate a new theme or programme, and there exists such a need and/or possibility, a person designated to plan a given programme may travel to those countries where necessary experience had been already won... In other words, we learn from inner-

\(^2\) Although one reservation is needed here - educational work within ENGO that do have members differs from those who work mainly through its own professional staff.

organisational experience (WWF Poland, Tymorek, May 17, 2012).

If WWF Poland commences a certain theme, we always check whether it had not been already studied elsewhere in order to avoid, e.g. similar errors or to formulate targets and plan our work as best as possible…. This is a feature that other organisations - both on a national scale and even more so local ones - simply do not possess (WWF Poland, Tymorek, May 17, 2012).

ENGOs, as mentioned before, are knowledge-intensive organizations, but only as far as environment is concerned. They work intuitively in other spheres of their activity. Usually, "methods" that ENGOs often "apply" in public-relations work, contacts with authorities and/or media are based on common sense, try-and-error, experiential learning.\(^3\)

Conclusions

My working hypothesis, as I presented earlier, was the following:

despite many similarities how a given ENGO work is organized, its staff and members do act and learn differently. One possible explanation is a political culture of a society they are living in.

Examples of how political culture of Poland and Sweden indeed differ have strengthen this assumption. Nevertheless, contrary to my hypothesis pertinent findings show the opposite:

despite significant differences in political culture, traditions of civil society and practical conditions in which ENGOs work, learning processes that occur in these ENGOs were visibly alike.

As my research shows, adults do act differently in different countries, while they do learn similarly.

References

Askvik, Steinar, Ishitaq Jamil and Tek Nath Dhakal, Citizens' trust in public and political institutions in Nepal, International Political Science Review, vol 31, no 4, September 2011


\(^3\) Again - one reservation needs to be made here. More innovative forms of learning and educating could be found in ENGOs that not only have members and/or volunteers, but also rely on them in their work.


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**Becoming Educated:**
**A Comparison Of Women’s Educational Resilience In Post-Conflict Cambodia and Urban Black America**

Educational resilience can be defined as persisting in school in spite of the adversities in life one faces. Worldwide, girls from poor backgrounds have low secondary school completion rates and even lower completion of tertiary education. Their challenges are exacerbated and intensified when they grow up in contexts characterized by extreme social disruption, such as in a conflict or post-conflict nation or in an urban area impacted by a high rate of drug use, violence, and crime.

This paper compares the educational life histories of young Cambodian women, who grew up during and after the Khmer Rouge genocide, and Black American women, who grew up during the crack cocaine epidemic in the urban United States. We are looking for ways in which girls’ and women’s experiences of accessing and persisting in school from primary through tertiary levels are similar across two nations with very different economic and social profiles.

In Cambodia, the net enrollment ratio for girls/women at the secondary level in 2006 was 33%; at the tertiary level in 2008, it was 34%. In the U.S., secondary-level enrollment for girls/women overall was 91%; at the tertiary level in 2009, it was 57% (United Nations Statistics Division). In Cambodia, the girls most likely not to complete secondary school have come from poor, rural areas. Eighty percent of Cambodians live in rural areas where access to education, health and other social services is limited. In the U.S., one of the demographics least likely to complete secondary school has been poor, urban Blacks (NCIS, 2010). Black girls are almost 2 times more likely to drop out than their white counterparts (NCIS, 2012). While studies have addressed the high dropout rates for Black boys, 53% for Black versus 22% for White boys in 2007-2008 (Schott Foundation, http://blackboysreport.org/; Toldson, 2008), 63% of Black female students nationwide failed to graduate from secondary school (NCES, 2009).

This paper goes beyond the statistics, seeking “inside out” stories from women about their efforts to stay in school.

**Research Design**

This educational life history study compares the educational resilience of poor,
rural Cambodian girls/women to that of poor, urban Blacks girls/women in the United States. In particular, the study compares women under 35 who were born into environments impacted by social upheaval: in Cambodia, the Vietnam occupation, and the subsequent United Nations presence in the 1990s following the Khmer Rouge genocide, and in the United States, the crack cocaine epidemic, which afflicted poor, urban Black communities.

Participants
Six Cambodian women and six Black U.S. women, who grew up during times of extreme social disruption, and who completed secondary education and went on to tertiary education were the participants. The Cambodian women were from impoverished rural areas. Three were born in the late 1970’s/early 1980’s, and three were born in the late 1990’s. Their narratives reflect the social context of those decades, in that those born in the late 1970’s responded to conditions of extreme social disorganization. For those born later, both more education system infrastructure existed as well as more employment opportunities in foreign-owned factories, domestic service abroad, and sex-related work in Cambodia and overseas, although the nation was still recovering from the trauma of the Khmer Rouge genocide. In order to match Cambodian and Black American participants as regards age cohort and proximity in time to severe social disruption, we will focus on the earlier Cambodian cohort.

The Black women were also from impoverished areas, specifically, inner cities East St. Louis and Cairo Illinois and the suburbs of Chicago. One was born in the late 1970’s and the others in the early 1980’s, a period when American inner cities were plagued by a crack cocaine epidemic, accompanied by high crime rates, mostly based on murder, drugs and gang violence.

The researchers
The researchers who gathered the data were members of the same demographic as their participants and thus were “insider researchers”. Stories told from the inside out are particularly valuable for groups, who are often represented in both the academic literature and by the media as either statistics or problems. Interviewers introduced the study to the participants by noting the small number of women from the participants’ demographic who completed their tertiary education. They then asked them to tell their life stories in terms of their own journey to completing their secondary and going on to enter a tertiary education institution. The interviewers returned for a second or third interview to ask additional questions. The initial study focused on Cambodian women. Recognition that specific groups of women in both the Global South and the Global North grow up in social and economic contexts with exceptionally limited opportunities inspired this comparative study.

Data analysis and trustworthiness
This study draws on Mikhail Bakhtin’s ideas of polyphony and dialogue. Polyphony refers to the incorporation of many voices, references, and assumptions that are not a narrator’s own, but which she may weave into her life story. Each voice carries a moral-political force. The idea of dialogism suggests that the narrator is in dialogue with these voices as she narrates her life (Bakhtin, 1930; 1984; 1986). The paper is also grounded in narrative psychology (Bruner, 1990; Sarbin, 1986) which sees humans as making meaning of our lives though stories rather than logic, from this standpoint, even rational ideas for one’s life are seen as part of a larger narrative that involves the other meaningful relationships.

Data were first coded narrative-by-narrative for each group in order to better understand how the women managed to stay in school and to identify the challenges they encountered. We defined narrative, for the purpose of analysis and in keeping with Bakhtin, as an utterance carrying a "should" message. However, unlike Bakhtin’s theory that all utterances carry a moral/political message, "should" utterances for most of these women also incorporated a message about the need to survive. We then sought particularly strong narratives within each of the two groups. We also looked in the data for reference to, either directly or obliquely, of historically contextualized political, economic, and social influences on the women’s lives. Other scholars have identified all of the narratives we identified in the women’s stories as represented in analyses or observation of mainstream Cambodian culture or mainstream African American culture. This contributes to the confirmability of our study. The “insider” positionality of two of the researchers contributes to the credibility of our research.

Significance
The data from the Cambodian part of this study has been developed into a narrative book and distributed to lower secondary school girls in rural areas, the demographic most likely to leave school. The production of the books was funded by Maryknoll Cambodia and distributed to girls in rural schools and communities by the UN Fast Track Initiative, UNICEF, World Education, the U.S. Peace Corps, and individual Cambodians who have returned to their home communities in rural areas to conduct workshops with youth. The intent is to replicate this distribution project in a contextually appropriate way with the data from the U.S. part of the study. Both studies together provide a counter narrative to the negative ones that persist for many young women who come from impoverished communities. They depict a more nuanced view of the persistence and strengths of young women in challenging contexts to inform parents, communities, and institutions that can support them to continue their schooling.
They offer stories of resilience and survival that can speak to many and perhaps help to increase the representation and attrition rates of these women in tertiary education. The stories begin the process of developing a public narrative out of personal struggles and triumphs.

**Cambodian Women's Narratives**

We identified three strong narratives in the educational life histories of the early cohort of Khmer women. In this section, we will present the general narratives and words from the girls' specific stories to contextualize the narratives.

**Girls should earn money to help their parents and siblings.** This narrative was at times voiced by the girls themselves, their parents, and their neighbors, although not consistently. For example, Saret (born 1979) described her neighbors' advice to her parents.

**Interviewer:** Did anyone, like neighbors or relatives, discourage you from studying?

**Saret:** Yes, especially my neighbors. I failed the Grade 8 exit exam once. At that time, I was big enough to work, and a lot of garment factories were opening around my house. Most of the children in my village, both boys and girls, around my age went into factory work. Only a few children from rich families, my elder cousin, and I were still studying. My elder cousin and I had the same living condition. Her father was a laborer, too. My neighbors asked my parents why they let me stay in school, since we could now find jobs. They told my parents they should tell me to drop out of school and work instead.

But, Saret’s parents were ambivalent:

My parents never considered it because I was able to earn my own money to go to school. They thought that if they didn’t have anything to give me, as long as I studied hard, they could help me to get knowledge. They never listened to others’ words.

But when I failed the Grade 8 exam, my mom and dad decided I should quit school, first, because I had failed the exam, and second, because at that time, my elder cousin was working at a Chinese factory. The factory wanted those they hired to have a Grade-8 education to do non-labor work, and they provided three months of training in Vietnam. They paid about $120 a month. Laborers got only $20 a month. Compared to other jobs, it’s a lot of money, and so Dad pointed out to me that I would get three months of paid training in Vietnam. They paid about $120 a month. Laborers got only $20 a month. Compared to other jobs, it’s a lot of money, and so Dad pointed out to me that I would get three months of paid training in Vietnam.

**Education is the path out of poverty.** This narrative was voiced counter to the previous one. It was either uttered or modeled by teachers; parents, siblings, and relatives; peers; NGOs; and the girls themselves. Each of these “speakers”, except for the NGOs, at different times voiced both this narrative and drop out of school to “support your family” narrative.

Again, Saret explains what the narrative means to her:

*Think about it: an old person carrying big grain bags is not easy. Sometimes, in the evening when Dad came home, he had calf strain and arm strain, so hard that he couldn’t walk. So miserable. This is the state I remember and will never forget. That’s why we must study hard, so that in the future we can take care of ourselves. Our life won’t be as hard as theirs...Laborers who work too hard will get internal injuries. That’s why I say that no matter what, whatever we can do to try hard, we should try. Time is valuable for us. And we must find the time to study. Everyone is busy, so we must find the time. Studying doesn’t require you to stop working. We can keep working. But whenever we have any free time, we must study. We must not waste our time and be idle and useless.*

Sophea (born 1981), who lived her first ten years in a refugee camp, stayed with relatives in the countryside and was determined to stay in school. She compares the life she wanted to what she saw around her:

*I kept thinking what I wanted to do. I wanted to work for a company. So I kept on trying to study. I had learned from the experience of being surrounded others who had very little education. They farmed and gardened, made snacks to sell, and found clams to sell their whole life long. I didn’t want to have a repetitive life like theirs. I must try hard myself. The Khmer girls “answered” these narratives with one of resilience and perseverance. This narrative was also, at times, voiced by a parent, usually a mother and accompanied with a warning to “not end up with a life like mine.”*
to reach Grades 7 and 8, my mother in Phnom Penh was trying to save money for me to go to school there. I lived in Areyksat for over a year. Lots of work.

Sophara (born 1981), whose parents were away from home much of the time, recalls taking care of younger siblings, cooking, and keeping the house while going to school.

When I got home from school, my sister and I were assigned different jobs to do. She went to the market, and I stayed home and cooked the rice. It was a hard time. I think for me, from the time I was six years old on – I was fighting for education at primary school.

While the girls themselves were determined to stay in school, others encouraged and inspired their determination. Saret voices the words of a teacher who encouraged her:

My teacher at Don Bosco [a Catholic-supported technical school] said, “You’re poor. Don’t worry. As long as you study hard, later you can get whatever you want. If now you walk while others ride a bicycle, you’ll get to school too, just later than they do.” She always encouraged me.

Sophara received similar encouragement:

The one who encouraged me the most was my mother—and myself... At Wat Koh School in Phnom Penh, after school, I played with others. When it was time, they left to go to private tutoring, and I was the only one who walked back home. My teacher wondered about this, and my friends said I didn’t have any money to pay. So he let me take private math classes without paying. Throughout junior high school, two teachers, math and physics, let me take private tutoring classes with them without charging me.

The general story these women tell is one of social disruption and poverty. The tension that exists between the duty they feel to contribute to the survival of their parents’ and siblings’ and their understanding that education could be a way out of poverty meant that the narratives voiced in their stories often contradicted each other. Nevertheless, even though at times they themselves believed they should drop out of school and work, they persisted.

The three women in the later cohort voiced the same narratives. What distinguished their stories was a somewhat more orderly social world, which was slowly being put in place around them. Organizations and institutions were beginning to provide more access to and support for staying in school.

Black Women’s Narratives

Three strong narratives characterized the Black women’s stories. In this section, we will draw on the women’s interviews to illustrate what these narratives meant to them.

Finish school and don’t end up in the predicaments in which your mothers found themselves. Historically, Black women have had experiences in the United States that distinguish their lives from those of other races. They are also affected by both gender and race issues. Dominant paradigms and societal hierarchies of gender and race can harshly impact the lives of Black women (hooks, 1984), including in the realm of education (Johnson-Bailey, 2001).

For the Black women interviewed for this study, education was seen as a way out of the hood (neighborhood, Projects, Inner City) lifestyle. The voices of family, friends and mentors of the Black women saying that education is way out were part of the women’s stories.

Images of the lives around her provided Alicia (born 1982) with the motivation to get out.

I continued in school because I didn’t have any other choice, there was no plan B in my mind. I looked around me, looked at my grandparent’s house and looked at my community and thought this can’t be life. I finished high school so I wouldn’t be a statistic, and I went to college, grad school and professional school so that I could maintain that status...it’s a cold world, but you can’t lose yourself in it.

Because you are Black, it will be harder for you to ‘make it’. This dominant narrative in the women’s stories reflects the high level of intersectionality, which Black women endure. Intersectionality is the interweaving of several stressors and factors, which must be faced on a daily basis (hooks, 1994).

The counter narrative to this is because I’m Black, I will prove to you that I will make it.

Kelly (born 1982) described her satisfaction at proving the dominant narrative wrong.

I always felt a high level of racism in my classes, I really couldn’t put my hand on it, but it was there. There were white people who thought they were the smartest and best in the program, and um you know, I made like a 15 on my ACT and a low score on my GRE. I never thought I was the smartest, but they thought they were sometimes. I felt they thought maybe I would not get a job or something, but funny thing is that I was the first person in the program that got accepted in the residency after only applying to ummmm two, I was the first that got selected. I was number one, and I was the first that got picked for one of the top programs in the country, and ummm the other Black girl - I don’t know if this is coincidence or what (laughs) - but she was the second person in our program to get picked for a residency, at one of the top in the country, and I got picked for the other one.

The women themselves were not the only ones to voice this narrative of “I will
make it”. The voices of their mothers and grandmothers were also present in their stories, often telling of sacrifices they made to survive.

Denise (born 1979), for example, tells of her mother’s efforts to support her daughter’s schooling.

My 8th grade year, I begged my mom, “Can we move?” So 8th grade year I said, “Okay, I do not want to go back to the school I previously went to.” So I went to a small Catholic school. I wasn’t even Catholic. But it was not the Roman Catholicism. That was contained to religion class, and it was a good experience. But I’m sure it did break my mother’s pockets. Tuition made it where my mother did not have money to save up for our own place. So, I took time to learn as much as I could there.

However, the pressures of drugs, crime, and violence in their communities were in tension with the image of women sacrificing to help their daughters. At times, social disruption became part of the girls’ home lives. One of the women describes being kept out of school.

At the age of 12, I was denied my legal right to receive an education. While most children were at school, I was at home babysitting my siblings. My mother promised us home schooling. Unfortunately, that vow was never met. I was home bound for three years. She said that we were homeschooled, maybe in her mind she thought that, but no. My mother’s not allowing us to attend school often reminds me of Pip’s sister in the novel Great Expectations by Charles Dickens. Since we feared my mom, we were too afraid to speak against this neglect. Oftentimes, due to domestic disputes, police would come to our home.

She later describes what her neighborhood was like:

I remember that I saw a dead man laying in a parking lot once. My grandfather and I were at a local grocery and right across from it was this man someone had rolled up on him in a truck and shot him. He was left uncovered on that street for hours. We stood and watched, talked to people, tried to figure out what happened. Eventually, going home around the corner, like it was nothing.

This life was not foreign to me. I would go on to have friends have husbands murdered because of what that man laying in the streets was murdered for. One of my friends had a husband killed in a car accident and her boyfriend murdered by a saved off shotgun. In some ways, moving from the abuse I had at home with my mother to East St. Louis was just another picture that violence surrounded me. My mom was from East St. Louis, and she called it “the jungle”. Today it is number one for murders, and four hours from that.

Chicago is the same thing when it comes to large cities.

Expectations by Charles Dickens. Since we feared my mom, we were too afraid to speak against this neglect. Oftentimes, due to domestic disputes, police would come to our home.

Later, her grandmother told her to not come home to their community after she earned her Ph.D.
voices of teachers recognizing the girls’ struggles and affirming them, either through their words or their actions.

Women in both groups told stories of persevering to remain in school, even in the face of discouragement. The resilience of the Black American women was buoyed by their faith in God. The Cambodian women “kept trying”. We interpret their narrative as being consistent with the Theravada Buddhist belief that each of us is responsible for our own liberation.

Diverging Narratives

At the most fundamental level, the narratives of staying in school to get out of poverty and the determination to stay in school in spite of pressures to drop out could be heard in the stories from both groups of women. And although the women grew up in different spiritual traditions, the teachings of those traditions could be heard in their narratives, and in fact, were a central source for their strength. Similarly, their social contexts were both characterized by extreme social disruption.

However, the two groups were positioned differently within their larger societies. The Cambodian women were all members of the Khmer majority in their country. They were, indeed, poor. But almost everybody in the country was poor at the time. While Cambodia, as a whole, has struggled to come to terms with perpetrating their own genocide and finding a way to live together in communities as former perpetrators and victims, their ethnicity or race did not define their role in the genocide. Social class did, with intellectuals, artists, and members of the government service being the primary target of the genocide. Nevertheless, Cambodians generally take pride in their long history, art, and culture.

The Black Americans, on the other hand, constituted a racial minority within a White majority national population. The Crack Epidemic overwhelmingly affected Black urban communities in the U.S. Most Black Americans were brought to the U.S. against their will as slaves. Dubois (1994) writes of the Black experience in the U.S. as characterized by a double-consciousness:

It is a peculiar sensation, this double-consciousness, this sense of always looking at one’s self through the eyes of others, of measuring one’s soul by the tape of a world that looks on in amused contempt and pity. One ever feels his two-ness,—an American, a Negro; two souls, two thoughts, two unreconciled strivings; two warring ideals in one dark body, whose dogged strength alone keeps it from being torn asunder. (p. 3)

Illustrating this, Alicia told her interviewer, “My grandmother told me on several occasions not to tell people where I was from. I recall when I started dating in college, she would warn me, ‘Don’t tell them you are from here. Get far, far away. This is a horrible place.’” Thus, while Alicia’s and other women’s resilience came from their identification with their ethnic environment and communities, they also held a shame that had been passed down from their relatives. The shame seemed to mirror the voice of media commentary on the people of urban inner cities being dark, nihilistic and unmotivated.

Reflections and Implications

We have not attempted to compare the educational life stories of women in the way we have done here without doubts about the wisdom of our venture. Stories and words can potentially provide deep insights into the meanings people bring to their lives. But such stories resist generalization. The attempt to say one life is like another must necessarily force us to overlook the details and peculiarities of the two lives and their contexts, a folly since no two lives are alike. A critical look will always turn up one more contextual variation to render such comparisons dubious.

Nevertheless, the narrative that education is a path out of poverty was alive and well in both groups of women. So was the personal narrative of determination and persistence, which each of the women expressed. This would seem to be a hopeful finding for all of us who care about women and education. However, a hint of the impending scarcity of employment opportunities for those who have completed university degrees was evident in two of the Cambodian women’s stories collected in 2010. As poorer nations often experience the world’s economic problems sooner and more severely than richer ones, by 2012, unemployment of the educated classes had spread to wealthier nations, including the U.S. and Western Europe.

Does this mean we should question of the value of a university education? While we might question whether or not women such as the ones in this study benefit from a tertiary education, we must beware of those who have already benefitted from education questioning the value of such an education for those who haven’t. We must take care as we take advantage of opportunities for ourselves not to “pull of the ladder behind us”, as Michelle Obama so eloquently said.

References


Informal Learning of managers in a multinational company in Germany, Great Britain and Spain: an Intercultural Comparison

The paper focuses on managers’ informal learning within the context of their company’s learning culture. It asks: How do managers learn informally in the context of different learning cultures? In different European countries, what are the differences and similarities in informal learning between three companies? The paper first identifies a terminological basis for informal learning, with special reference to the German debate. Thereafter it outlines the comparative design for the study. Using the category resources for informal learning, the paper then gives an insight into the research study. The study results are presented in three steps: a descriptive and analytical juxtaposition, a descriptive comparison, and an analytical comparison. The analytical comparison gives an idea of the reasons for the differences. Finally, the interpretation of the comparison is discussed critically.

1. Informal learning

1.1 Discussion on informal learning

In the German discussion, informal learning was long characterized by what it was not, i.e. unplanned, unorganised, or subconscious. Schöpfthaler (1981) coined the term ‘residual category’ for informal learning. Dohmen (1999, p 25) defines informal learning as ‘…unplanned and non institutionalised learning in all aspects of life…’ and as a ‘…natural type of human learning…’. He formulates the main characteristics of informal learning as, ‘…immediate in everyday life…’, ‘…determined by a reason – incidental – sporadic…’, as well as ‘…holistic – problem oriented…’. This understanding of informal learning limits the awareness of informal learning. The terminology for empirical research is missing. Informal learning that happens in organised or institutionalised education is likely to be excluded from the empirical research.

Parts of this paper are based on an already published paper in the Journal Andragogical Studies (Egetenmeyer 2011)

Translated by R.E., original: nicht planmäßig organisiertes und nicht institutionalisiertes Lernen im Lebensvollzug, natürliches Grundform menschlichen Lebens (Dohmen 1999, p 25)

(see also Dugid, Slade & Schugurensky 2006; Aberton 2008).

Similar to American authors (Marsick & Watkins 2001), authors in Germany focus on the context of informal learning. Straka (2000; 2001, p 56) has studied ‘learning in informal environmental conditions’. Through this it is possible to talk about learning in an informal context.

This contextual understanding of informal learning is the basis of several current studies. Studies using surveys typically ask for the context as well as the resources people use for informal learning. The Canadian NALL-Study (Livingstone 2000) studied informal learning by asking about learning activities in different learning contexts: ‘employment’, ‘community volunteer work’, ‘household work’ and ‘other general interest’. Schiersmann (2006) has asked in her survey for ‘work-based learning’, ‘learning in the community and in private’ and ‘learning through the media’. Kuwan/Schmidt/Tippelt (2009) studied elderly people’s informal learning and asked about ‘reading activities’, ‘computer and internet use’, ‘TV, radio and video use’, ‘family, friends and colleagues’, ‘museums’ as well as ‘libraries and learning centres’. In most of these studies it seems that informal learning ‘just happens’ in a chaotic and unstructured way if the context offers enough options and possibilities.


In all of these studies there is almost no discussion on how informal learning differs in different European contexts.

1.2 Terminological Basis

The following European Union definition has been the basis for this research:

Informal learning is a natural accompaniment to everyday life. Unlike formal and nonformal learning, informal learning is not necessarily intentional learning, and so may well not be recognised even by individuals themselves as contributing to their knowledge and skills. (European Commission 2000, p 8)

The research presented here has been designed as an interview study. Consequently, the research could only focus on the informal learning experiences that the interviewees could articulate.

For a terminological basis, positive criteria of informal learning were developed. In the study (Egetenmeyer 2008) this acted as a heuristic model. Informal learning is understood as a subjective learning activity which is influenced in a specific way by its context. The companies form a specific context for informal learning. They influence different aspects of informal learning.

Figure 1: Informal learning as ways of learning within a company

Source: according to Egetenmeyer (2008, p 18)

The assumption of the study is that companies operate in different contexts which influence the informal learning that takes place. Regional and national contexts create meta-contexts into which the company contexts integrate. There are other reference-contexts, e.g. customers, into which the company-context is only partly integrated.

The operationalisation of the term informal learning was focused on the following five aspects: learning subjects, learning motives, ways of learning, resources and informal learning control.

2. Comparative Research Design

Based on an outline of our understanding of informal learning, given above, a comparative study is developed. This asks: How do managers learn informally in the context of different learning cultures? In different European countries, what are the differences and similarities in informal learning between three companies? The study aims to present a type of comparison, identified by Reischmann (2008, p. 27; 2005, p. 139) as the fourth type of international-comparative adult education which he calls “comparison”.

To find out about the cultural differences in informal learning, an intercultural comparative study was designed. In three case studies the informal learning of managers in three companies in Germany, Great Britain and Spain (Egetenmeyer 2008) was research. The study focuses three situations in three
differences. As the study researches the learning cultures in the three companies, it is named “intercultural comparison” but not “international comparison” as Charters/Hilton (1989, p.3) are proposing comparison in different countries. In 2005 19 semi-structured interviews were carried out in German and English in three similar firms. All the firms belonged to one affiliated group, located in Germany, which build and sell dive systems. The interviewees were managers and people responsible for Human Resource Management (in the following called Human Resource Managers). Based on an understanding of learning which is subject specific, the firms’ learning cultures were studied through the description of the subjective learning behaviours of the managers on one side, and the strategies of the Human Resource Managers on the other. In each firm four managers and two to three Human Resource Managers were interviewed.

Differences in informal learning across the three learning cultures were researched by analysing and comparing the content of the interviews. To do this the author chose a four-step procedure.

(1) Descriptive Juxtaposition: Following the above understanding of informal learning, the situations in the three companies used as case studies, were described and compared. The results of this first step are a collection of several learning subjects, learning motives, ways of informal learning and resources used in each company. Each of these aspects stand side by side.

(2) Analytical Juxtaposition: The analytical juxtaposition looks at the common features of informal learning within each case study. What are the ideas behind the different learning subjects, learning motives, ways of informal learning and resources? What are the common features which guide informal learning in each company? In this way, different analytical foci were used to get an in-depth view of each informal learning category.

(3) Descriptive Comparison: Common features within each company were identified and then compared between the different case studies. This allowed an analysis of the similarities and differences between the situations in the three companies. Also, by looking at the differences between the case studies, further concretisation could be made. Then, in addition, further analysis of the coherence within each case study could be carried out.

(4) Analytical Comparison: The fourth step was to identify the reasons for these differences. Links could then be made to common educational characteristics in the three countries. In this way the analytical comparison aims to examine “the social, cultural, economic and political forces” (Titmus 1999) which shape informal learning in the three contexts.

The last two steps refer to two categories of comparative research identified by Titmus (1999). Also, through the above process the aim of the study is to follow Charters & Hilton’s (1989, p.3) definition of comparative study in adult education.

“A study in comparative international adult education (…) must include one or more aspects of adult education in two or more countries or regions. Comparative study is not the mere placing side by side of data concerning one or more aspects of adult education in two or more countries. Such juxtaposition is only a prerequisite for comparison. At the next stages one attempt to identify the similarities and differences between the aspects under study and to assess the degree of similarities or differences. Even at this point the work of comparisons is not complete. The real value of comparative study emerges only from stage three – the attempt to understand why the differences and similarities occur and what their significance is for adult education in the countries under examination and in other countries where the finding of the study may have relevance.”

In addition to these three steps, the juxtaposition was done in two steps. Thus, the study, on the basis of the juxtaposition, already has an analytical focus. As the study is exploring adult learning, the interviews provide several individual aspects of the managers’ learning processes. To find an analytical basis for a comparison it was necessary to look at the links between the individual interviews – and therefore the different kinds of informal learning within each case study – before a comparison between the case studies was possible.

Within the limited space of this paper, we present the juxtaposition of one aspect of the study – the resources for informal learning. This juxtaposition is followed by a descriptive comparison of the informal learning resources in each of the three case studies. Followed, finally, by the analytical comparison.

3. Resources for informal learning: descriptive and analytical juxtaposition

In the interviews, several resources were found. These were described as potential for informal learning. Beside the organisational structure of a company, the managers perceived attitudes towards informal learning as important resources. In the following I distinguish between personal, structural, temporal and ideational resources.

3.1 Personal Resources

The interviewees mentioned several people who supported informal learning in their work. People who can give advice, can answer questions or can show them new ways to learn. In the context of an enterprise, there are several people who can act as a personal resource, e.g. supervisors, colleagues or experienced staff.

The German managers named several people they used to support their informal learning: supervisors act as role models or as supporters, e.g. through feedback. Predecessors and more experienced colleagues acted as senior experts. Peers were used for personal interactions. Direct reports gave feedback. The German interviewees showed that they used various people to give different perspectives for their informal learning. Different people acted as personal resources depending on their roles and experience. The interviewees identified differences in the roles of their supervisor and other colleagues. Whereas supervisors were a resource because of their position, colleagues were a resource...
because of their individual experiences.

The British managers identified their supervisors as advisors and supporters. Their colleagues acted as discussion partners, senior experts or as special experts. The interviewees described having an interactive role with their supervisor. This means that their supervisor actively encouraged their informal learning. They describe peers taking a similarly active role as a personal resource for informal learning.

In the Spanish company the following personal resources were identified in the interviews: supervisors acted as promoters, colleagues as responsible people and peers as senior experts. Typically, in the Spanish company the managers identified people whose role included acting as a support for colleagues, as personal resources for informal learning. This means that people with that specific responsibility are identified as personal resources. This indicates a responsible-oriented character for personal resources in the Spanish company studied.

In summary, German interviewees used various colleagues in a heuristic way as personal resources. They name different people as possibilities for supporting informal learning. This indicates that they then use different perspectives on a subject. That makes it possible to have a diverse perspective on a subject and supports a knowledge-oriented approach to informal learning. The British interviewees used specific people for their informal learning activities. They mainly describe sharing experience with supervisors or peers. In the Spanish company they describe personal contacts with people with specific knowledge or abilities as resources. The company structures identify people who are responsible for different topics. These people with responsibilities act as personal resources.

3.2 Structural Resources

Structural resources mean the internal organisation of a company which makes informal learning possible or which constrain informal learning. International structures as well as organisational aspects, are part of structural resources: working methods, agreements or instructions.

In the German company the following structural resources support informal learning: appraisal interviews, a broad literature offer, access to information technology, networks, organisational aspects and company growth.

The structural resources found in the German company interviews are distinguished by their enabling characteristics. This means that the interviewees described resource possibilities for informal learning. The structural resources were described by the interviewees as having a heuristic character. The description was more focused on the potential of the resources, how they were used depended on the individual learner.

In the British company the following structural resources could be identified: appraisal interviews, specific publications, in-house experts, regular team meetings as well as cooperation with German colleagues. A function-orientation could be identified in the structural resources of the British company. This means that each structural resource has a specific function. Structural resources get by this their value through the specific function.

In the interviews with the Spanish managers, the following structural resources were identified: intranet, the organisation of the company, responsible people, membership of an international concern, regular team meetings as well as the coffee machine as a central meeting point. The structural resources in the Spanish company have an orientation-character. They are characterized by specific responsibilities and an organisational framework which provides guidance. The structure helps the individual find support for their informal learning as it is clear who is responsible for each single question. Further characteristics of structural resources are personal relationships and a good environment for personal interaction.

In summary, the German managers interviewed use structural resources to get several perspectives on a topic. They identified a possibility for informal learning as learning from colleagues who had different work experiences. Furthermore, they also described having open access to publications as a support for informal learning. In contrast, the British managers saw explicitly selected publications or a specific knowledge exchange as supportive, which points to a goal-oriented approach. The Spanish managers referred to the organisational structure through which they could contact people with similar tasks. A specific form of guidance is available in the Spanish company. This guidance can help employees to integrate themselves into the company. Furthermore the structure gives them a specific possibility for informal learning.

3.3 Temporal Resources

Informal learning is often integrated in working tasks. Nevertheless, learning also needs time of its own. Under temporal resources, we include all of the conditions which the company or individuals create to enable them to have time for informal learning.

In the interviews with the German managers we can identify temporal resources such as, working time on trust, an induction and the availability of temporal independence. This indicates that the interviewees used the independence in their day to day work as a temporal resource for informal learning. This indicates the enabling character of the learning processes and personal responsibility for learning activities.

In the British company time for exchange of knowledge as well as the possibility to set one’s own priorities could be identified as a temporal resource. In the interviews indications could be found which showed that temporal resources were created for a specific purpose. This shows goal-orientation as a
characteristic of temporal resources.

In the interviews with the Spanish managers, references which point directly to the use of temporal resources for informal learning were not found. Several references which point indirectly to temporal resources were times provided for training or workshops. In addition, the coffee machine that was mentioned also supports informal exchange among colleagues in the company. The open culture of discussion described in the Spanish company is an example of temporal resources. Managers can take time to explain issues or answer questions. Through this, structural and ideational resources in the Spanish company provide temporal resources for informal learning.

In summary, in the German company independence can be identified as a temporal resource. This allows for individual methods of learning. In the interviews in the British company, we observed a goal-orientation. In the Spanish company the aspect of belonging to the organisation plays an important role.

### 3.4 Ideational Resources

Ideational resources are attitudes in the companies concerning the professional and personal continuing development of the employees. Ideational resources can be understood as values or cultural aspects in the companies which support informal learning.

In the German company, the following ideational resources could be identified: a willingness to delegate broad responsibilities, patience, acceptance that mistakes happen, and collegiality.

The interviews indicated that ideational resources created a positive environment for informal learning. The interviewees describe resources which make emotional informal learning possible.

In the British company broad responsibility, filling jobs internally and collegiality can be identified as ideational resources for informal learning. The ideational resources described are goal-orientated. The first two ideational resources are ways of motivating informal learning. The collegiate attitude could be an indication of a common responsibility for the success of the company. Beside this, managers refer to the fact that it depends on the employees’ willingness to take part in informal learning activities.

In the interviews with the Spanish managers, the following ideational resources could be identified: trust, which they got by having new responsibilities, a culture of open discussion, as well as a supportive attitude towards the learning interests of the staff. The ideational resources in the Spanish company are about providing for learning possibilities. It is up to the staff to use them. Beside this, friendly relationships with colleagues were described as important.

In summary, in the German interviews the importance of having

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<th>Heuristic</th>
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<th>Responsibility-Oriented</th>
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<tr>
<td>Function</td>
<td>Enabling Informal Learning</td>
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<tr>
<td>Context</td>
<td>Independence</td>
<td>Company Targets</td>
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Source: author's own (according to Egetenmeyer 2008)

While the resources identified in the German company indicate a heuristic approach to informal learning, the resources identified in the British company indicate a function-orientated approach. The resources identified in the Spanish company are characterized by specific responsibilities which support informal learning.

We can see these differences if we take a closer look at the personal resources. The German interviewees name various people, each of whom they use in different ways to support informal learning. This shows that people are available and enable informal learning. Further, independence as a context condition is seen as a supportive factor by the managers. It puts the choice of resources into the hands of the learners.

The idea of a function-orientated approach to informal learning taken by the British managers is supported by the choice of supervisors and colleagues as personal resources. The primary characteristic of these resources is that they

4. Comparison of resources for informal learning: descriptive comparison

In comparing the resources for informal learning in the three companies, we identified differences concerning character, function and context.

Fig. 2: Comparison of resources in informal learning

While the resources identified in the German company indicate a heuristic approach to informal learning, the resources identified in the British company indicate a function-orientated approach. The resources identified in the Spanish company are characterized by specific responsibilities which support informal learning.

We can see these differences if we take a closer look at the personal resources. The German interviewees name various people, each of whom they use in different ways to support informal learning. This shows that people are available and enable informal learning. Further, independence as a context condition is seen as a supportive factor by the managers. It puts the choice of resources into the hands of the learners.

The idea of a function-orientated approach to informal learning taken by the British managers is supported by the choice of supervisors and colleagues as personal resources. The primary characteristic of these resources is that they
contribute to the company’s success. Transparent targets are necessary if a function-oriented approach to resources is taken. These were seen in the British company studied.

In the Spanish company people with a specific responsibility are used for informal learning. Their function is to give guidance to colleagues. A characteristic of the way personal resources are used is a collegial relationship which makes the resources easier to access.

5. Informal learning in three countries: analytical comparison

How can these results be interpreted? There is of course no doubt that there are strong organisational influences on the informal learning of managers. Surely differences between informal learning can be found, if three different companies in one country are studied. The study focuses only on the informal learning of managers in these companies. It does not intend to present the whole learning culture of the three companies.

The results show that informal learning depends on concrete resources in a personal, structural, temporal and ideational manner. Informal learning does not just happen. It depends on the resources which are available. Furthermore, the study shows that managers in different companies value different resources, although overall similar resources are available in the three companies. In the companies, a similar approach to how and which resources are used could be identified.

The different approaches to informal learning in the three companies studied indicate a similarity between the three approaches to learning and the educational traditions of each national context. In the informal learning of the German managers, references to German educational philosophy could be found. The heuristic character of the learning resources, which enable learning, demonstrate an understanding of open learning shaped by a subjective oriented educational philosophy of an all-round educated human being. Independence seems to be an important context for the German managers. Everyone should have access to education at any time and in any place. By this, the German interviewees indicate the importance of enabling learning and having freedom in their learning processes. Furthermore, understanding plays an important role. This reflects the ideas of the German educational philosophy according to Humboldt. You can also find the presence of British characteristics: goal-orientation, systematic and functional methods of informal learning. This understanding indicates an educational system directed towards goals and examinations. This reflects the British education system with its orientation towards goals and benchmarking and where a good examination result can be seen as the goal itself. Reflections of the Spanish education system can also be seen in the Spanish characteristics: adult education in Spain developed from creating educational access for workers and migrants. The focus was on integration. You can also find this integration approach in the Spanish interviews in the study.

In this way we can make links to the education traditions of the countries in which the companies in the research study are based. This finding is highlighted through two contrasting examples from the British company. One interviewee has an American education and work experience background. He approaches informal learning from a superficial perspective, very similar to the other company managers. However, based on the reasons and strategies for his informal learning, we can see differences between his approach and the characteristics outlined by the British managers. In the same company, another interviewee has both a German grammar school and a British higher education background. Interestingly, research into his way of informal learning shows a lot of characteristics common to managers with a British education background and some characteristics common to managers with a German education background. This analysis therefore asks whether in this context, it is more the culture of higher education than the company learning culture that shapes the informal learning. From this, we could see Mason’s third process that he associates with globalisation: “new hybrid identities are becoming, at the expense of national cultural identities, increasingly visible” (Mason 2007, p.179).

6. Conclusion: Reflection on the comparison

International or intercultural studies should always be interpreted taking into account the cultural perspective and knowledge of the researcher(s). Arthur (2008, p. 59ff) identifies three different meanings “…the primary meaning which is constructed in relation to self and its cultural context and the secondary meaning which is collectively constructed from the other primary meaning by the group.” The third meaning is a kind of knowledge which is constructed by the “negotiation processes within the group.” Looking at these distinctions, the present study is based on a single researcher’s interpretation. This, therefore, avoids several pitfalls which can arise in comparative studies carried out by research groups (cp. Bron 2008). However it also limits the role of the three examples in this study: The three case studies are not equally researched cases. In validating the study we should be aware of the “ethnocentric perspective[5]” (Mason 2007, p. 183) of the researcher. As the researcher is German, the study provides only a German perspective (with some international experience…) on informal learning in the three case studies. Terminology used, and the composition of the interview guide, are grounded in the German debate. Because of this, the British and Spanish characteristics can only be understood in relation to the German perspective. The study, therefore, follows Wagner’s idea of relationship, which is “more appropriate to the bringing together of two equivalent entities of viewpoints” (Wagner 1981, p. 3). Or looking at Titmus
(1999, p.37) “The unknown is only to be understood with reference to the known.”

Taking this into account, the value of the present study lies chiefly in a deeper understanding of informal learning in Germany. In this respect, when identifying specific characteristics, the study aim is “making the familiar strange” (Spindler and Spindler 1982, p. 43). This follows Reischmann’s words “the outside-look to a foreign country reflects back to better understanding one’s own country: observations made in a foreign context help to better perceive and understand adult education and how it operates not only in the other but also in ones own country”. (Reischmann 2008, p. 21) These positive criteria of informal learning are developed against the background of the German debate in adult education.

References


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Research on the Use of Learning and Degree Contracts within University and Other Settings in Italy and the USA

Abstract:
This paper presents some of the benefits of using learning contracts by some in the USA who have used them for many years, and others in Italy who had never used them, but were beginning to experiment with using them. Illustrations of results were provided by colleagues from both countries, comparisons were made between the two, and lessons learned from the experience were shared. There is a very different perspective between using them over a long period of time and just beginning to use them. However, the keenest insight is that they are beneficial at each stage along the way, but in different ways. It is important to acknowledge the benefits of each stage of growth and the long range positive results that accrue in the overall process.

Introduction
Perhaps the conceptual and theoretical roots of contract learning reach back to the foundation and practice of independent study (Dressel and Thompson, 1973), which, in turn, was spurred by the antecedent ideas of andragogy (Kapp, 1833), Comenius in his 17th century Pampedia (In Savicevic, 1991; Comenius, 1982) and emerging from ancient times with the Hebrew Prophets, Jesus Christ, the Greek Philosophers, and even Confucius. Dressel and Thompson (1973, p. 1) suggested that independent study was basically premised on the ability of the learner to carry on independent study, alone or with peers being a major goal of education and learning, which they defined as “the student’s self-directed pursuit of academic competence in as autonomous a manner as he (or she) is able to exercise at any particular time.” This implied that in learners there would be various stages of development regarding the extent to which learners are able to exemplify self-directedness in their learning – in the process they are following and in the subject matter content they are seeking to acquire and internalize (to make their own).

Thus, there have been many folks throughout the centuries that have devoted
their energies to learn things they considered valuable and important, as well as discover things of which they were not previously aware. Among some of the approaches they used, a number of them came in contact with the Learning Contract (LC). There are a number of definitions or descriptions. Webster (1991) defines contract as, "an agreement between one or more parties for the doing or not doing of something specified" (p. 295-296). Webster (1991) also defines learning as, "knowledge acquired by systematic study in any field of scholarly application" (p. 772). By combining these two definitions we may define contract learning as an agreement between a student and institution or faculty member to acquire knowledge systematically either in the classroom or independently. The problem with this definition is that it borders on possessing very legalistic connotations. Many people object or rebel to this and, therefore, many users of learning contracts call them "learning plans", "learning commitments", "study plans", "learning agreements", or "self-development plans" (Knowles, 1986).

Some considered the LC to be a convenient administrative device. Collins (1991) has pointed out that the contractual bargain is often one-sided, with all the obligations being on the side of the student, and none on the part of the teacher. The teacher does not even undertake unequivocally to award a pass mark to the resultant work: she will do so only if in her judgment it meets the required criteria. After all, a learning contract, sometimes may be misconstrued as follows: The teacher undertakes that if the student produces such work as the teacher specifies, to a standard which the teacher will determine (whether or not that standard is based on fixed criteria or personal whim, and regardless of whether the standard is known to the student), the teacher will award a mark to that work. The student indicates acceptance of this 'agreement' by producing the work.

Very simply, the following description could be that learning contracts are agreements between a teacher (or teaching team) and a learner (or occasionally a group of learners). However, Atherton (1991) conceived that a learning contract is a document which a student creates to compare current abilities with desired abilities, and determine the best strategy for bridging the gap between them. The question may be: What do you need to know that you don't already know? The learning contract includes learning objectives, available resources, obstacles and solutions, deadlines, and measurements. Fox (1983) also supports that the learning contract specifies what is to be learned, how it is to be learned and how learning will be verified.

Nonetheless, Knowles (1986) indicated that in his initial half-century (at that time) as an adult education practitioner, he had begged, borrowed, and stolen many ideas and techniques from other educators, with most of them improving his practice. But the ideas and techniques exemplified by the Learning Contract (LC) process made the most difference in what he did and solved the most problems that plagued him as an educator. However, it is curious that he confessed his not knowing from whom he got it. Notwithstanding, the first time Henschke remembers seeing any document where Knowles refers to and uses an LC is in his 1975 book entitled “Self-directed learning: A guide for learners and teachers.” And Henschke had already graduated from Boston University with his Doctoral Degree in 1973 and had not heard any reference to the LC during his doctoral work. Moreover, he remembers also hearing Knowles speak about his new Self-directed learning book in 1975, and the fact that he was beginning to use the learning contracts. Knowles mentioned with excitement that he learned about the learning contract from Berte (1975), who posited that learning contracts, though not binding legal documents in the strictly legal sense of contract, are written agreements or commitments reached between a student and a faculty member regarding a particular amount of student work or learning on the one hand and the amount of institutional reward or credit for this work on the other.

Thus, as Knowles (1986) experimented with the learning contract, developed them in more detail and he found that students began to understand course objectives more clearly, he became committed to them more deeply. He discovered that students and participants with a wide range of differences – learning styles, backgrounds, paces of learning, and other idiosyncrasies – planned strategies and resources that helped learning become individualized and supported a prime characteristic of adulthood which is the need and capacity to be self-directing. He also used them in workshops and groups within educational institutions, corporations, government agencies, professional societies, health agencies, voluntary organizations, religious institutions, and other social systems.

Consequently, Knowles (1975) further discovered that although these institutions impose requirements on their personnel for entrance into the profession or completing their degrees, a learning contract is a way to provide structure to learning and to give a lot of control to the learner over their learning. The learning contract became a means of reconciling imposed requirements from institutions and society with the learners’ need to be self-directing. It enables them to blend these requirements in with their own personal goals and objectives, to choose their own ways of achieving them, and measuring their own ways of achieving them. The learning contract thus makes visible the mutual responsibilities of the learner, the worker, the teacher, the facilitator, and the institution (Knowles, 1975).

It was a short time after this experience in 1975 of being exposed to the whole idea of learning contracts that Henschke began using them in various adult education settings and programs with which he became involved. Isenberg became involved in using learning contracts in the early 1990s, during her Master’s and Doctoral Program at University of Missouri-St. Louis, where she
studied with Henschke. Fedeli and Giampaolo, a faculty member and doctoral student at the University of Padua, Italy, became involved in learning contracts in 2010, as a result of meeting and working with Henschke at the 2010 American Association for Adult and Continuing Education National / International Conference in Clearwater, Florida. Henschke became a sort of mentor to the other three practitioners and researchers involved in writing this paper, especially as it relates to the use of learning contracts. In the remainder of this paper, we will present some of what each of us has done regarding learning contracts, namely our work in progress, a comparison of our various approaches and differences between how we have used them in the USA and Italy, various lessons learned, and how we have helped each other in the process.

**Various Uses of the Learning Contracts in Italy and the USA: Work in Progress**

Learning Contracts have been and are continuing to be used in the University of Missouri-St. Louis and Lindenwood University in the USA; and, in the University of Padua, Italy. Each one of the authors is at various stages of their development and use of learning contracts. They have been used for various purposes. This is one of the unique benefits of the learning contract in that they are very flexible in the purpose(s) for which they are used. The order of presentation will be John A. Henschke – during his time with the University of Missouri and Lindenwood University; Susan K. Isenberg – during her time with the University of Missouri, Christian Hospital in Northeast St. Louis, and Lindenwood University; Monica Fedeli – during her time with the University of Padua, Italy; and, Mario Giampaolo – during his time at the University of Padua, Italy. As each one’s perspective is presented, it will be as if they are speaking in the first person. This will make it more personal to be able to understand.

**John A. Henschke**

As a Continuing Education Specialist in the University of Missouri Extension, a Professor of Adult Education with the University of Missouri-St. Louis College of Education, and a Professor and Chair of the Doctoral Emphasis Specialty in Andragogy at Lindenwood University School of Education, St. Charles, Missouri, I applied and used learning contracts in numerous ways. I began using them in 1975 and continue using them until the present time of this writing and will continue during the remainder of my educational career. The structure I most regularly used was Knowles’ (1986) five columns as follows: What are you going to learn (objectives), How are you going to learn it (resources and strategies), Time span of when you will learn (schedule), How will you know that you learned what your objectives specified (evidence of accomplishment), and, What standard will be used and who will validate that you learned what you indicated (proving that you learned what you said you would learn)?

I used the Learning Contract (LC) with a small Convent of 50 Roman Catholic Sisters who had not had a new novitiate enter into the Order in more than a decade. The average age of the sisters was increasing one year each year this continued. They expressed concern that if this pattern continued, their Order would soon ‘die-out’. The Superior General and Council worked together with me for 75 days over a period of almost three years, during which each member of the Order developed and used an LC for herself, and the total group developed and implemented a LC for their future. In the process they looked at their past and considered options for their future. The happy result was that they initiated a merger with another Order and successfully came together to form a new Order. They are alive and vibrant today – 32 years later – looking toward a bright future and are receiving new members along with carrying on active contributive ministries.

I engaged the participants in Learning Contracts (LC) as part of an adult education program I conducted with the manager and 15 members of the educational and human resource division of a major corporation serving two US states. They had not received an update on education in about 16 years and requested my university to provide the update. I was selected to address this issue. We worked together for two and one-half years on this project. Each one of the participants became engaged in developing, writing and implementing a learning contract that served their learning needs throughout the duration of the project. The total group along with their manager developed and implemented a learning contract that would help to guide them in ensuring that they received and internalized the updating goal. As the time progressed, each person and the team gained the competence that helped them become the most effective team in the corporation. They were involved in changing the function of the corporation’s education division toward performance support. They used to carry on the education of the workers the traditional way of taking them off the line for a week or two and then sending them back to their job with the workers saying “I am glad that is over with; now we can get back to our work and forget all this stuff.” As they received and internalized the educational update, they made some changes. They were expressing themselves in a way that made one perceive them as being delighted that they were contributing to their organization and to their community.

The manager of the above group decided to take a Master’s Degree in Andragogy to learn how to do what I had been conducting with them during the update. At the end of his degree program he designed and implemented what he wanted to do for his ‘capstone / internship’ experience. He elected to do the research within his corporation, to analyze all of the current training / educational programs being conducted and determine the time, costs, etc., for them. Then, he used that data, redesigned and recalculated the cost in time, costs, etc., for all of them so that they would be conducted with an
Andragogical, self-directed, learning contract approach. Then, he compared the two. His conclusion was that if the new approach were actually implemented in the corporation, in a five year period of time, they would save $5 million US Dollars. Since he had the data from inside the corporation, he was able to do a thorough analysis.

I worked with a group of educators in which they were trying a different approach in sex education engaging parents and children together in the learning sessions. The fathers and sons participated together in their sessions, with mothers and daughters participating together in their sessions. We conducted the facilitation and implementation of their developing learning contracts and communicating together in such a way that it was family members interacting with each other on matters that they considered important in this regard, rather than us as educators determining the scope of the conversation. The most valuable things that came out of that program were: The communication without embarrassment that family members (parents and children) had with each other on a topic they had not previously considered discussing; and, we kept a record over a five year period of the teen-age pregnancy rate in that community of five counties and compared it with the teen-age pregnancy rate over the same five year period throughout the whole state of Missouri. We found the pregnancy rate in those five counties to be about 60% less than throughout the whole state of Missouri.

One of the foundational andragogy courses I teach at Lindenwood University (LU) from when we were starting a Doctoral Program in Andragogy is entitled: Foundational Development and Implementation of Learning Contracts with Adult Learners. There were a number of doctoral students already in the leadership development doctoral program, and many who were waiting to get into it when LU would develop an alternative to a K-12 focus. In the learning contract course, the participant’s responsibility is to develop and implement a learning contract. Consequently, the first time the Learning Contract course was offered, the class group developed a learning contract on the development of the Doctoral Emphasis Specialty in Andragogy. As a result by the end of the semester, they had developed five initial courses focused on andragogy, and the Andragogy Doctoral Emphasis Specialty was approved by the Lindenwood University faculty and administration, and was ready to be fully implemented by four weeks into the second semester. In the two and one-half years since the approval we have developed and added seven more courses in the program, with a number of new enrollments into the doctoral program. In addition, the students and faculty meet for one hour each week to discuss the development and direction of the andragogy program focused on addressing the students’ needs. To further develop this course on Learning Contracts, we have the students engage in studying what has been previously developed in other universities and settings. There are 89 programs that have used Learning Contracts for various purposes: Business, industry and government; colleges and universities; education for the professions; religious education; elementary and secondary education; remedial education; independent studies; academic classrooms; degree programs; professional and management development; clinical courses; graduate assistantships and internships; and, introducing learning contracts into an organization. We have had almost all of these implemented by students in class presentations and workplaces. I have also had them implemented in other universities where I have worked.

A number of my students have experienced the following through their use of learning contracts.

1. Active engagement of 65 participants in 22 locations using learning contracts on a telephone network, in learning twelve themes of andragogy through a course on advanced methods and techniques of adult education.
2. A Christian School administrator changed the whole focus of the school by engaging the teachers in developing their own learning contracts for their improving what they are teaching. He also is ADHD and Bipolar, with his vomiting prior to previous course sessions when he had to take a test or exam because he was so nervous. Now that he uses a learning contract which eliminates the necessity of tests or exams, he carries forward and completes his academic work responsibly, with no vomiting involved because he is relaxed and not nervous.
3. Various students will break down the subject matter of a course into manageable parts and do a separate learning contract for learning that part of the course. They find this much more helpful to them in the early stages of using a learning contract, rather than trying to encompass the total subject matter of the course in one learning contract.
4. One student was all confused about the function of a learning contract. She was only able to come to part of the class sessions; hence, she was left with the presentation on the beginning purpose and understanding of a learning contract. At first she thought of this as a disadvantage. However, in working her way through for making her presentation, she was able to eliminate all her confusion about learning contracts and get an abundantly clear picture of their benefits. Thus, she was delighted with the outcome of her presentation.
5. One student who works in an investment firm developed her learning contract in which she focused on what the company could do regarding hiring returning veterans from the battlefront in Iraq and Afghanistan. The company embraced her idea and has now hired several hundred veterans and have taken the unusual step of providing them a three-year time frame on full salary to get themselves into the frame of purely commission, instead of the usual commission requirement of new hires. They are finding it working very well and the veterans are moving forward responsibly toward the goal of commission only.
I asked one of my doctoral students (Mary Ann – a pseudonym) to reiterate her perception of using learning contracts. Following is her take. Learning contracts offer multiple benefits, as the facilitator you are able to assess the learners interest, understanding, learning needs and goals effectively and efficiently, thus, enabling you, the facilitator to determine how to help the learner reach her/his individual learning objectives, thereby assessing learning outcomes. For the learner, learning contracts offer empowerment. Learning contracts are an example of the embodiment of the six assumptions of adult learners. Following are examples of how learning contracts exemplify Knowles’ six assumptions of andragogy from one learner’s viewpoint:

- As a learner I was required to be self-directed, I had a vast area of subject matter (limited to the specific course topic) and was trusted to know my individual learning needs and how to achieve them.
- The format for my learning was up to me. Example– I could have chosen: to seek knowledge by interviewing individual experts, by searching the internet, or the library. I could have sought understanding from books or others personal experiences; I could have attempted to gain skill by creating a presentation or by demonstration; most important to me was the ability to evaluate my learning myself, thus, enabling me to assess my learning and decide if I met my learning objective or what I still needed to learn. The format variety is unlimited which allows for active learner participation.
- Fulfills the readiness to learn desire in adults, although a grade is a requirement of the program or course the topic of research/learning is what I the learner felt I needed to learn about a given subject.
- My motivation for the use of each strategy was internal versus external. This format was about my desire to learn, not about fulfilling a program requirement.
- The entire learning contract is an example of one of the six assumptions of the adult learner – why learn something. The learners’ ‘need to know’ is the beginning and end of using a learning contract and everything in between fed that need.
- As a learner my past learning experience provided a reference for the objectives I would ultimately choose to meet and which style/format I would choose to present and evaluate my learning.
- Learning contracts allow and encourage me to engage in an educational activity that is continually new and unfamiliar, thus allowing growth.
- This format (learning contracts) meets the traditional requirement of assessing learning and determining a course grade; however this format allows negotiation between facilitator and learner regarding individual learning goals and the expectation required to earn the desired grade.

These examples are only one learner’s experience with using learning contracts; however, I feel that learning contracts provide more active learning opportunities and not just “another examination to study and remember answers for.” My personal experience with learning contracts or the alternative to traditional grading is that the learners and facilitators who utilize learning contracts feel they have a trusting relationship between faculty responsible for grading and the learner; thus, enabling true learning.

Susan K. Isenberg

My observations included the idea that learning contracts are a creation of the learner, not the teacher. The act of simply creating a learning contract for self-planned learning marks the beginning of the learner’s self-directed learning. I have used learning contracts inside and outside adult education classrooms in formal and non-formal learning environments—always with remarkable results. The tone of the learning environment seems to immediately change upon introduction of learning contracts from a feeling of having no control to a feeling of having all the control.

As a nurse educator in a hospital education department, I introduced the use of learning contracts with newly hired experienced critical care nurses to facilitate their competency gap learning. Instead of requiring all newly hired experienced critical care nurses to attend a 4-week full-time critical care course which was expensive, time consuming, and disrespectful of their prior knowledge and experience, these nurses self-assessed their learning by comparing the new job competency requirements to their previous job(s). They created a learning contract—a gap plan for how they would learn only what they did not already know in order to meet the new job requirements. Strategies and tactics for how they would learn and the evidence and validation of their learning varied greatly from nurse to nurse, each creating a unique mix of learning experiences both formal and informal, textbook and on-the-job, shadowing experienced nurses and trying new skills under expert supervision, and even taking a portion of the formal critical care course that covered new knowledge and skill they needed for the job. Newly hired experienced critical care nurse orientation satisfaction increased while the cost decreased—a win-win outcome for the hospital.

As a consultant, I used learning contracts in executive coaching to help high-level leaders (CEOs, vice presidents, directors) self-assess and then engage in self-planned learning to improve such things as health, leadership, relationships, work-life balance, business strategy, and satisfaction over a 6-month period of time.

As an entrepreneur, I created software titled Virtual Health Coach, an example of a non-human planner (Tough, 1979) that helps users make behavior changes to improve their health. Users engage in an interactive coaching session with an animated talking character that tailors its responses to the users’ responses and then helps them create a behavior change plan that is a
modification of the learning contract. With one keystroke, users are then linked to online resources that match their behavior plan strategies and preferred learning style. Making a behavior change always requires learning something new related to knowledge, understanding, skill, attitude, value, and interest (Knowles, 1980).

As a professor of andragogy, I use learning contracts with my students in all masters and doctoral degree courses I teach--both on ground and online. Students plan their own learning within the context of the course content and negotiate with me for their grade. The learning contracts of students who have taken several andragogy courses demonstrate an increasing complexity with each additional contract they create. Learning contracts are catching on in other non-andragogy courses taught by non-andragogy professors. A colleague of mine who is a non-andragogy professor always uses learning contracts in her education research course since learning about them two years ago.

Monica Fedeli and Mario Giampaolo

The University of Padua, Italy is a very traditional institution, established in 1222, perhaps the oldest university in Italy, if not Europe. This is the university where Copernicus and Galileo were students and later became professors. Being quite traditional, they have not entertained much innovation in their practices, having adhered to more of a lecture style of teaching and learning. Nonetheless, when I (Monica Fedeli) met John Henschke at the 2010 American Association for Adult and Continuing Education (AAACE) Conference in Clearwater, FL, it was the beginning of seeking to do a cooperative research venture in which it was decided to use Learning Contracts and consider the pros and cons for student learning. In addition, I prepared a paper for the 2011 Midwest Research to Practice Conference in Adult, Continuing, Extension and Community Education, held at Lindenwood University, St. Charles, Missouri. John Henschke and I added some ideas related to researching on the use of Learning Contracts. We moved forward on considering our research. Henschke provided some of the basic materials he has used in learning contracts for many years (Knowles, 1975; and Knowles, 1986). This material has proven to be the most beneficial for people starting to work with learning contracts. Although some of them are difficult to understand at a first glance, we needed to start somewhere, and this seemed to be an excellent beginning.

When I returned to Italy from the Midwest Conference, Marion Giampaolo and I began to plan how we would take the Learning Contract materials and work with our students. Since Mario is a Doctoral Student of Monica, he would fulfill some of both capacities – facilitator and student. We decided to use the learning contract in an action research that we would call, The use of a Learning Contract within an Italian University system. The main research question was “In what ways can LCs be integrated into the Italian university system?” and “In what ways are LCs meaningful for students as tools in the learning process planning?” The number of students in the class was 48, with 46 being female, and two being male. The number deciding to use learning contracts was 37, and the average age of students was 35. One seasoned adult educator, Marcie Boucouvalas, said that in using learning contracts at the University of Padua, we were causing an earthquake.

Monica and Mario provided the following guidelines to the learners for using Learning Contracts (LC): Use the LC – to diagnose learning needs; specify learning objectives; identify learning resources and strategies; provide evidence of accomplishment; and show how evidence would be validated. An illustration of the LC was provided with such learning objectives as: To develop the knowledge of theories explaining the evolution of people management; Acquisition of vocabulary related to organizational behavior; To understand the factors of personal development; Understand the links between organization and training; and, Identification of the different components of a methodology.

Participants judged the Learning Contract (LC) as 52% positive, and 48% negative. Positive elements were that the LC represents a novelty (19%), reflexive strategies (31%), monitoring strategies (8%), organizational strategies (14%), opportunity for personal growth (6%), opportunity to become aware (11%), opportunity for clarification (8%), and possibility of focusing (3%). Negative elements were that the LC represents misapplication [difficulty of translating learning results into objectives] (21%), negative feelings (18%), unknown practice (3%), complexity (33%), over-commitment (15%), and unnecessary practice (9%).

We came to the conclusion that we can adopt the same program of study for each group. The reflexivity of the LC tool allows one to activate clarifying learning results, better explain results, improve a sense of control, and embracing a deep sense of awareness. Often the LC is too complex to figure out in the time available, seems useless because time restricts turning learning results into objectives. As one implements using the LC, the positive factor is the help of the tutor and usefulness of the videos that were used. The negative side is the possible misunderstanding of the function and potential of the LC.

Expressed a bit differently, this study shows that the majority of students perceive the LC as a tool that allows reflection, control, and a sense of awareness on our learning. It provides the possibility of clarifying and explaining own learning results. Dividing the LC process in two, the introduction process and the compiling process, we have found that the most important problems happen during the compiling process. The most important negative judgments are about the complexity and the misapplication [difficulty of turning and translating learning results into learning objectives] of the tool especially during compiling, and misunderstanding the task during the presentation.
The Take Home Messages are as follows: First of all we have decided to use a learning contract based on learning results that each student has to reach, instead of on competencies that students need for their work. Second, students hadn't the possibility to really personalize their learning; they only learned how to fill LC. So, it has been difficult to understand the sense of the tool.

Comparing Learning Contracts in the USA and Italy

Some interesting comparisons can be made between the use of learning contracts (LC) in Italy and USA, as reflected in the University of Padua in Italy, and the University of Missouri and Lindenwood University in the USA. First, use of the LC by John A. Henschke at the University of Missouri (UM) began in 1975. He continued to use it consistently at UM until 2009, when he retired. He then continued to use it to the present time, after he joined the Lindenwood University Faculty in 2009. Susan K. Isenberg used the LC at UM from beginning in the late 1990s until being graduated with her doctoral degree in 2005. She also used it at the BJC Health Systems in St. Louis during that time until 2007, at which time she joined the Lindenwood University Faculty and continues to use the LC to the present. Monica Fedeli and Mario Giampaolo, began using the LC in 2011 at the University of Padua and continue using it to the present. Based on this information, it would be natural to assume that there are varying stages of development, understanding, confidence and comfort with each of them using the LC with themselves and with their students and constituencies they serve.

Second, use of the LC in the USA with Isenberg and Henschke is oriented toward a connection with various learners and/or groups of learners or organizations with which they work – learners in the university and constituent groups and organizations in the surrounding communities. Their efforts have been aimed toward individual learning and on organizational purposes of very diverse nature. On the other hand, Fedeli and Giampaolo have focused their efforts almost exclusively on a group of approximately 50 students in one course at the University of Padua. This group focused on considering the possibilities of the benefits from the LC (a very innovative, non-traditional approach to university student learning) accruing to the students and their degree program[s], within considering how this may impact [positively or negatively] the course and degree program at Padua, that had traditionally been focused on lecture type of education.

Although there are some similar and some quite different outcomes that result from these different approaches in these very different cultural settings around our global community, each of these may be mutually applauded in their accomplishments. Learning is taking place in both and benefits are mounting and contributing to both groups of individuals and societies where these programs are being conducted.

It is well to consider the benefits that will come to both the group from Italy and the USA, if these professional people with share with, listen to, and understand the value of each other’s approaches in the learning situations through use of Learning Contracts. If the relationship continues between these two countries through collaboration, much growth could be anticipated on both sides. The future will tell the story. We look forward to hearing and seeing it take place.

Lessons Learned

As facilitators of andragogy, we have learned that students can usually transfer some of what they already know about goal setting to learning contracts. Most have been involved in some kind of personal goal setting in their professional lives that prepares them, albeit in a limited way, for the task of developing a self-planned learning contract. Learning to develop and use a learning contract is a process of trial and error that seems to reach a point of enlightened self-satisfaction--when the fog lifts and they can see the purpose and value of engaging in such a process. The delight seems to come from being asked, often for the first time in their lives; What do you want to learn within the scope of this course content and how do you want to learn it? Thus, they are gaining control of their own learning. Time must be given to the development of personal learning contracts early in the course--each student requiring different kinds and amounts of feedback--for a positive learning experience to be the outcome. It is important that students and faculty not overlook the benefits of each stage of the learning contract, and not expect the same benefits to be present at each stage along the way. It is a process of gaining knowledge of the LC, understanding the application of the LC to a specific situation in one’s life or community, acquiring and implementing the skill of using the LC, gaining a positive forward looking attitude regarding the possibilities offered by the LC, increasing the ownership of valuing the LC in one’s everyday life, and anticipating an increase of interest in exploring benefits of the LC.

References

This paper addresses explorative, case study-based comparative findings on art education for adults in the USA and in Germany. It raises basic issues of art education for adults in both countries and relates them to preliminary interpretations and questions, asking for a prospective larger study and better generalization.

A case study is “a study of a case within its context” (Cohen/Manion/Morrison 2011, p. 289, referring to Yin 2009, p. 8). In my paper, I make use of the analytical and piloting strength of the case study design. Moreover, it is framed by a comparative design (sui generis), which “attempts to identify the similarities and differences ... [and] to understand why the differences and similarities occur and what their significance is for adult education in the countries under examination ...” (Charters/Hilton 1989, p. 3, cited after Reischmann/Bron 2008b, p. 10). Comparative case studies allow for an elaboration of the cultural and societal embeddedness of adult education institutions. As cross-cultural studies, they are dialogical, diverse and open in nature (cf. cf. Reischmann 2008, p. 21; Bray 2008; Ochs/Philips 2002). A comparative in-depth study deepens our understanding of adult education. It helps us to identify good practice and to make it available for program planning (cf. Charters 1999, p. 55). For this purpose, I combined two sources of data: a) semi-structured focused interviews with both education directors/program planners and participants, b) qualitative program analyses. The instruments of data collection and analysis (interview guideline; outline of categories) have been developed in an abductive mode.
Art education encompasses learning endeavors in the subareas ‘fine arts’ including visual arts (‘Bildende Kunst’) and ‘performing arts’ (‘Darstellende Kunst’) (1), as well as ‘applied arts’ (2) and ‘art history’ (3). It reflects on general understandings of the concept of ‘art’ in ‘modern’ societies. The techniques of art production and the assumptions in regard to the impacts of art vary over the time. At present, we envisage a popularization of art in both countries under examination as well as in many other ‘Western’ countries (cf. Schlutz 2009). Accordingly, in both countries, a broad idea of art education is being developed. Vice versa: The wide range of learning opportunities exists thanks to the popularization and democratization of art in the second half of the 20th century. Art education in the year 2012 equally takes place at adult education institutions, museums, galleries, community centers and other learning venues. Different from events like concerts and artistic shows, art education involves some kind of non-formal learning and teaching activity either classroom-based or self-directed (i.e. learning labs in museums). Teaching methodologies may be receptive (presentations on art history, dance etc.) or creative/productive (painting, poetry, dancing, singing etc.). (Cf. Gieseke et al. 2005; Fleige/Robak 2012; Taylor 2010)

In my paper I describe similarities and differences of art education for adults in the US and in Germany as well as the social and cultural context and other driving factors: Can we describe certain tendencies in the pedagogical concepts? How do they relate to the current discourses about art? What are the consequences of art education for individuals, organizations, and communities? I also attempt to identify examples of good practice worth mutual borrowing (cf. Reischmann 2008, p. 21). I will elaborate on these questions on the basis of five comparative case studies on art/adult education institutions in the cities of Chicago (USA), Berlin and Chemnitz (Germany). I begin with (1) theoretical framework in regard to concepts, institutions and benefits of art education. In the second part (2) I introduce the institutions under examination. After presenting and discussing my findings (3) I conclude with reflections on the questions raised above (4).


1.1 The Contemporary Conception of Art and Art Education

In the beginning of the 21st century the transformative and mobilizing impact of art not only on individuals, but also on communities, and even on societies and the ‘world society’ is widely recognized. The production, the reception, the academic discourse and the ‘market’ of art have become a global social phenomenon. Class constraints in the production and especially in the reception of fine arts, traditionally reserved for the upper and upper middle class (cf. Bourdieu 1987) have been loosened since the 1950s and 60s. The invention of abstract expressionism, serial art, pop art, and their interdependencies with advertising and design started a process of popularizing the fine arts among the middle classes: Both in the US and in Germany, as well as in other ‘Western’ countries, museums and galleries have become extremely accessible. Artistic hobbies like photography have turned into mass phenomena. Accordingly, we observe an increase of art-related learning venues and activities.

These developments are interdepending with the expansion and segmentation of the middle classes in regard to income and status as well as lifestyle and values (social milieus) over the time. The increasingly prosperous upper middle class milieus and the academic, intellectual milieus are equally art-oriented. Simultaneously, we are at a point where the lower class (working and unemployed) in both countries is more than ever alienated from fine arts except for the cultivation of class-specific performing arts. These mechanisms of inclusion and exclusion seem to be reinforced by terminological biases, at least in Germany. For example, the traditional association of the term ‘Kunst’ (‘art’) with the upper and upper middle class sustains the persistent parallelization of ‘fine arts’ and ‘Kultur’ (‘culture’). This perception brings about a difficult parallelization of ‘art education’ and ‘cultural education’ (‘Kulturelle Bildung’).

However, in regard to the artistic criteria of art, contemporary conceptions of art stress the aesthetic attraction and value of human everyday life practices and artifacts. Exemplarily for current discussions on this matter, the dOCUMENTA (13) has settled criteria for the ways in which everyday life can be reflected in visual art. Many of the works of this year’s exhibition deal with the awareness of nature, the relationship of human beings and animals as well as with community and (social) space. Many items were realized in the tradition of the ‘arte povera’ and therefore with a strong emphasis on installations, and on objects that were made of natural materials or materials of daily use. On the basis of these very general categories, the exhibition fashioned a broad and open understanding of art that loosens the boundaries between works of art, practice and artifacts as
well as the boundaries between fine arts and applied arts. At the same time, a variety of the works in the exhibition addressed political dimensions of existence, especially environmental policy. (Cf. dOCUMENTA (13) Guidebook, p. 6f).10

However, it is clear that the pedagogical concepts in art education were developed accordingly to the popularization of art since the 1950s. Following various authors both from the US and from Germany art education for adults should initiate (cf. Lawrence Lipson 2005b, c; Gieseke u.a. 2005; Robak/Fleige 2013; Stang/Peez 2003):

a) The improvement of self-awareness via: sustaining a person’s artistic and overall cultural knowledge; fostering sensitivity, self-efficacy and emotional stability as well as intuition and directness; access to aesthetics; developing creativity and creative skills; producing art (visual and applied);

b) The Improvement of the awareness of others via: access to matters of cultural diversity and community building; sustaining the capability to understand and release social tension.

Blind spots in the present concepts in both countries include the above-stated delay in the reproduction of the contemporary artistic conception. Another problem is the lack of an adequate discussion on knowledge and skills required for art production, also with respect to the chances and limits of adulthood learning abilities in this area.

1.2 Benefits of Art Education

This section deals with the consequences of art education for individuals, organizations, and communities. The notion of the ‘benefits’ that result from the participation in adult education relates to the idea of an instrumental use of learning. Art education has traditionally been perceived least instrumental since it is associated with those ‘soft skills’ named above. Instead, the benefits of adult education are being discussed with reference to either cost-benefit analysis or the monitoring of participation and learning outcomes (cf. Bardeleben et al. 1996; Seidel/Hartmann 2011; Ginsberg/Wlodkowski 2010, p. 31). It has been argued that members of the lower class are underrepresented in adult education (except for basic education and literacy) partly because of their low expectations of benefits. However important these findings are, a qualitative, andragogical or even philosophical understanding of the terminology is still missing (cf. Fleige 2011a). Clearly, ‘benefits’, according to the utilitarian origin of the word, relate to the instrumental and effective/rational use of learning outcomes in regard to the optimization of action, status, job satisfaction or personal happiness. At the same time, the choice to participate is never fully calculated but tied to emotions, learning interests and intrinsic motivation (cf. Gieseke 2009; Knowles 1989, pp. 83f., cited by Merriam/Brockett 2007, p. 136). Moreover, there are always unintended benefits of personal growth as well as chains of benefits (cf. Fleige 2011a; Dietel 2012, p. 209), which develop over the time and which are the greater the more a participant involves emotionally with the content and the learning group.

Against this background, participation in art education seems to be a perfect example of intrinsic motivation and a type of utility that is not primarily economic. There is evidence for this assumption from various empirical studies on art education: Through knowledge, experience, aesthetic pleasure, production and reception, art education fosters self-esteem and self-improvement in the most radical way (cf. Gieseke 2005). Moreover, art education institutions such as local museums can impact on collective knowledge and social learning (cf. Taylor et al. 2010, pp. 332ff.). The findings are also backed by studies on performing arts and health education. For example, dance classes bring about benefits of physical and mental health (cf. Dietel 2012). However, the perceptions of the wider benefits of art education seem to differ in both countries. For the present German discourse it is more likely to find statements on the importance of creativity and analytical skills at the workplace. On the other hand, discussions in North American more stress the development of critical skills for social development. Both trends are echoed by more general discussions on adult education. (Cf. Butterwick/Egan 2010, pp. 117-121; similarly for Britain: Schuller et al. 2001; Feinstein et al. 1998)11

1.2 Institutions of Art Education

In general, the institutions of adult education in the USA and in Germany vary considerably with regard to their tasks, their organizational structure, their degree of institutionalization and cooperation and their funding. Within this landscape, those institutions that offer art education for adults are marked in italic letters.

<table>
<thead>
<tr>
<th>USA</th>
<th>Germany</th>
</tr>
</thead>
</table>

10 Developments like this are reflected and forwarded not only by curators, newspapers and art schools, but also by cultural and social theory. From a cultural-theoretical point of view, we like to think of art as human practice, and in a system-theoretical view as a reflective system alongside other functional systems (cf. exemplarily Reckwitz 2006; Baeccker 2000).

11 The Surveys on the ‘wider benefits of learning’ proof the gain of social capital through all kinds of adult education, especially general, non-credited/non-formal education.
Institutionalized, cf. Fleige 2011, pp. 29 ff.). While these institutions (Charters 1999, p. 55) there is a German landscape of subsidized, funding. In comparison to the US-American “expansive array of agencies” institutions provided by large non-profit organizations that receive public funding: Academies by Churches, Unions, Foundations etc.; Open to everyone, offer programs in at least two of the content areas that are offered by their Volkshochschule.

Apart from that, the dominating sector in Germany is the one of professional continuing education on the federal or state level. Continuing professional education in private, for profit organizations. Professional organizations, chambers (Germany) and networks; also as blended learning. Continuing professional education in enterprises. For profit or not for profit; open to everyone, offer civic/environmental education, basic/literacy education, GED, prep, professional continuing education (both credit and noncredit), German and foreign languages.

Concentrating on postsecondary education: Public, communal Adult Education Centers (Volkshochsuhule).

Institutions provided by large non-profit organizations that receive public funding:

- Academies by Churches, Unions, Foundations etc.; Open to everyone, offer programs in at least two of the content areas that are offered by their Volkshochschule.
- Continuing education at universities (Wissenschaftliche Weiterbildung).
- Continuing education at universities (both credit and noncredit), German and foreign languages.
- Similarity: Learning Centers where the Volkshochschule is involved.

**Table 1: Landscape/typology of adult education institutions in the USA and in Germany**

<table>
<thead>
<tr>
<th>USA</th>
<th>Germany</th>
</tr>
</thead>
<tbody>
<tr>
<td>Community Colleges</td>
<td>Public, communal Adult Education Centers (Volkshochschule)</td>
</tr>
<tr>
<td>Open to everyone, offer civic/environmental, art education, intercultural dialogue, health education, basic/literacy education, GED, prep, professional continuing education (both credit and noncredit), German and foreign languages.</td>
<td>Open to everyone, offer civic/environmental education, art education, intercultural dialogue, health education, basic/literacy education, school leaving certificates, prep, professional continuing education (both credit and noncredit), German and foreign languages.</td>
</tr>
<tr>
<td>Concentrating on postsecondary education:</td>
<td>Similarly: Learning Centers where the Volkshochschule is involved.</td>
</tr>
</tbody>
</table>

Quasi- and noneducational institutions not for profit with public/tax and mixed funding:

- Museums, art centers, galleries, environmental organizations, sports and recreation organizations, institutes, foundations, societies.
- Institutions and agencies for continuing professional education on the federal or state level.
- Continuing professional education in private, for profit organizations: Professional organizations, chambers (Germany) and networks; also as blended learning.
- Continuing professional education in enterprises: For profit or not for profit; open to everyone, offer civic/environmental education, basic/literacy education, GED, prep, professional continuing education (both credit and noncredit), German and foreign languages.
- Four-year colleges and universities: Continuing education at universities (Wissenschaftliche Weiterbildung).
- Workers’ education in unions and labor organizations: Religious, art and volunteer education in congregations and religious bodies.
- Special Schools for music, theater etc.: For profit or not for profit; open to everyone, offer civic/environmental education, basic/literacy education, GED, prep, professional continuing education (both credit and noncredit), German and foreign languages.
- Special Schools and independent education organization for basic education and literacy.

Table 1: Landscape/typology of adult education institutions in the USA and in Germany

The Volkshochsuhulen and the Community Colleges are comparable types of institutions. Apart from that, the dominating sector in Germany is the one of institutions provided by large non-profit organizations that receive public funding. In the USA, it is the quasi- and non-educational institutions with mixed funding. In comparison to the US-American “expansive array of agencies” (Charters 1999, p. 55) there is a German landscape of subsidized, public/community educational institutions, legally and socially recognized (“institutionalized”, cf. Feige 2011, pp. 29 ff.). While these institutions cooperate in umbrella organizations and communal advisory boards, adult education institutions in the USA are more fragmented (cf. Lösche 1998, p. 12; Merriam/Brockett 2007, p. 127), and they would not necessarily define each other as adult education institutions. This fragmentation corresponds with the one of social milieus into local communities. Compared to Germany, the neighborhood, as a geographic or spatial unit, plays a more important role in the formation of the social community. The geographical distribution of social milieus is quite hermetic, and it often has an ethnic dimension.

2. Introduction of the case institutions and their contexts

Against this background, I chose five institutions for my empirical study. The only type that is missing is a community college, due to field access restrictions.

2.1 The Institutions

I The School of The Art Institute (SAIC), Department for Continuing Studies, Chicago, USA, 36 South Wabash, Chicago, IL 60603, USA, www.saic.edu.

The Art Institute Chicago is a world famous art museum for all kinds of epochs and areas of arts. It is located in downtown Chicago, operating as a not-for-profit corporation on a mixed funding basis and cooperating with the district. It was founded as a museum and as a school in 1879. With regard to the history and the mission of the Art Institute we are learn that “the permanent collection has grown … to nearly 300,000 works of art in fields ranging from Chinese bronzes to contemporary design and from textiles to installation art. … Together, the School of the Art Institute of Chicago and the museum of the Art Institute of Chicago are … internationally recognized as two of the leading fine-arts institutions in the United States.” (http://www.artic.edu/about/mission-and-history) The School, SAIC, offers all kinds of programs for children, adolescents, families, teachers and adults. Adult programs cover higher and continuing education both credit and noncredit, summer schools, lectures, gallery talks and so on. They are both creative and receptive and include fine arts (visual), applied arts, and art history.

II Hyde Park Art Center (HPAC), Chicago, USA, 5020 South Cornell Ave, Chicago, IL 60615, USA, www.hydeparkart.org/education.

The Hyde Park Art Center, Chicago, is a community art center located in the neighborhood ‘Hyde Park’. It is a not-for-profit organization operating on the basis of mixed funding. It attracts both citizens from the neighborhood itself as well as from all over Chicago. On the website we are told that “founded in 1939, the Hyde Park Art Center is at once a contemporary art exhibition space, learning lab, community resource, and social hub for artists and art-curious
alike. [It] presents innovative exhibitions of new work by primarily Chicago-based artists; education programs for children and adults, novice through professional; and, free public programming for a diverse and creative audience."

(http://www.hydeparkart.org/about) Adult classes cover both visual arts (painting, drawing, photography) and applied arts (ceramics and other areas). Classes run for ten weeks and are mostly creative. The open program is completed by exhibitions and gallery talks. In addition, HPAC started a new program for professional artists that want to take the next step in their careers (‘Center Program’) in 2012. Courses and programs are noncredit.

III Volkshochschule (VHS) [Communal Adult Education Center], Fachbereich Kulturelle Bildung [Department for Art Education], Chemnitz, Germany ,’Das TIETZ’, Moritzstraße 20, 09106 Chemnitz, Germany, http://www.vhs-chemnitz.de.

The Volkshochschule is the local organization for adult education in Germany. There exists one VHS in every larger German city, also reaching out to the countryside. The VHS is a very well established, developed and researched adult education institution that flourished in the 1920s and survived the division of Germany. It is recognized as the generic and state-funded ‘communal’ institution (cf. Süßmuth/Sprink 2009). The VHS Chemnitz was founded in 1919.

Since 2004, the VHS Chemnitz, the city library and the museum of natural history form a municipal public utility undertaking by the name ‘Das Tietz’. The VHS Chemnitz offers noncredit and credit courses in a variety of content areas. Its mission is to “provides a chance for everyone to develop and deepen knowledge, capability and skills regards to social, professional and societal participation.” (http://www.vhs-chemnitz.de/Leitbild.122.0.html) Fine arts classes include literature, performing arts (music, dance) and visual arts (painting, pottery, photography). They are both receptive and creative. Moreover, we find classes in applied arts and art history. They are completed by excursions and exhibitions. Although the courses are noncredit they may be used for professional development, depending on the participants’ learning desires.

Note: While finishing this paper I discovered the comprehensive empirical study by Görner-Schipp (2012) on art history classes at the VHS, operating with similar but more differentiated categories.


A successor of the Royal Museum, founded by Friedrich Wilhelm III of Prussia, the world famous National Museums in Berlin “constitute a Universal Museum for the preservation, research and mediation of … art and culture of the entire history of humanity. Their collections embrace the areas of European and extra-European art, archaeology and ethnology. … Supported collectively by the German government and the federal states, the National Museums in Berlin regard themselves as a national institution of cultural federalism in Germany. “

(http://www.smb.museum/smb/ueberuns/index.php?p=2&objID=3294&lang=en) The Akademie der Staatlichen Museen zu Berlin opened in 2002. It is an institutionalized learning venue of the ‘Besucherdienst’ which itself exists since the early 1980s. Classes at the Akademie focus on art history and are mostly receptive. They address adult learners at every age, including university art students (undergraduate and graduate). But the courses are noncredit. However, the academic seeks cooperation with universities. The program consists of four-week-lecture series alongside exhibitions and special exhibitions. At the same time, the Akademie serves as an instrument for making the exhibits more accessible. (Cf. Gieseke 2005, pp. 225f.)


The Kunstsammlungen Chemnitz is a museum for pre-modern as well as modern and contemporary fine arts located in Chemnitz, the third biggest city in the federal state of Saxony as well as in the overall Eastern Part of Germany. Founded in 1909, the museum is praised for its modernist approach. It is operated as an independent institution of the City of Chemnitz. Museum pedagogy at the Kunstsammlungen includes tours and classes for children, adolescents and adults. Classes for adults are, as we learn from interviews, loosely coupled with exhibitions in terms of topics and techniques. They are based on a combination of guided and unguided tours and creative activity. They foremost refer to visual art but also address art prints and design as subareas in applied arts. Classes are announced in the local media (no program brochure available).

2.2 The Contexts

Table 2 summarizes the depicted organizational contexts of the case institutions:

12 The Akademie was inspired by the École de Louvre in Paris but it is not a higher education institution and it is not comparable in size either.
### 3. Research Findings and Reflections

The institutions vary significantly between as well as within the two countries:

<table>
<thead>
<tr>
<th>SAIC Chicago (I)</th>
<th>HPAC Chicago (II)</th>
<th>VHS Chemnitz (III)</th>
<th>Akademie der Staatlichen Museen Berlin (IV)</th>
<th>Kunstsammlungen Chemnitz (V)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Organizational Context:</strong> the Art Institute itself (museum and school)</td>
<td><strong>Organizational Context:</strong> HPAC itself (exhibition space and community center with informal and non-formal learning venues)</td>
<td><strong>Organizational Context:</strong> the VHS, the city library and the Museum for Natural History</td>
<td><strong>Organizational Context:</strong> the National Museum in Berlin with 16 different locations</td>
<td><strong>Organizational Context:</strong> independent institution of the City of Chemnitz</td>
</tr>
<tr>
<td><strong>Funding and legal form:</strong> independent institution of the City of Chemnitz, not-for-profit organization operating on the basis of mixed funding</td>
<td><strong>Funding and legal form:</strong> not-for-profit corporation on a mixed funding basis and cooperating with the district</td>
<td><strong>Funding and legal form:</strong> independent institution of the City of Chemnitz, not-for-profit organization operating on the basis of mixed funding</td>
<td><strong>Funding and legal form:</strong> independent institution of the City of Chemnitz, not-for-profit organization operating on the basis of mixed funding</td>
<td><strong>Funding and legal form:</strong> independent institution of the City of Chemnitz, not-for-profit organization operating on the basis of mixed funding</td>
</tr>
</tbody>
</table>

| **Specializes in art education:** | **Profile:** higher and continuing education; summer schools, lectures, gallery talks. Creative and receptive. Fine arts (visual), applied arts, and art history. Credit and noncredit. | **Profile:** art education is one out of five content areas; **Profile:** fine arts classes include: literature, performing arts, visual arts (receptive and creative); applied arts, art history, and exhibitions. One-year-Program for semiprofessional artists | **Profile:** art history classes (series of 4, alongside exhibitions), mostly receptive; for adult learners at every age, including university art students. Noncredit | **Profile:** art education; **Profile:** classes are loosely coupled with exhibitions; based on a combination of guided and unguided tours and creative activity; mostly visual arts but also applied arts. Noncredit. No program brochure |

### Table 2: Organizational context of the case institutions

Additionally, we take into account the social and cultural context on the local level (cf. Pacyga 2009; Häußermann 2010; Gräser o.J., Reißmüller et al 2011):

<table>
<thead>
<tr>
<th>SAIC Chicago (I)</th>
<th>HPAC Chicago (II)</th>
<th>VHS Chemnitz (III)</th>
<th>Akademie der Staatlichen Museen Berlin (IV)</th>
<th>Kunstsammlungen Chemnitz (V)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chicago: Facts: 2,866,000 inhabitants (57.5 Mio in the Chicago Area); third largest city in the USA, located in Illinois and at the Lake Michigan (Great Lakes). Dominant image: the Art Institute itself (museum and school)</td>
<td>HPAC Chicago (II): Facts: 27,700 inhabitants; location of the University of Chicago; heterogeneous structure of black and white community (unlike anywhere else in the city); unlike downtown Chicago, Hyde Park is covered by small buildings for the most part. Dominant image: Metropolitan city of culture and art, trade and middle class life.</td>
<td>VHS Chemnitz: Facts: 245,000 inhabitants; third largest city in the federal state of Germany and in the overall Eastern part of Germany. Dominant image: the past (without 1933–1989): Industry, industrial culture and modernism.</td>
<td>Akademie der Staatlichen Museen zu Berlin (IV): Facts: 3,427,000 inhabitants; capital and seat of government of the Federal Republic of Germany; largest city in Germany. Dominant image: the past (without 1933–1989): Metropolis of culture/fine arts, education/academia (humanistic tradition), and political power. Center of ‘Prussia’. Religious freedom/secularization since the 17th century. Rapid urbanization and industrial expansion in the late 19th century.</td>
<td>Kunstsammlungen Chemnitz: See above.</td>
</tr>
<tr>
<td><strong>Profile:</strong> specialization in art education; <strong>Profile:</strong> higher and continuing education; summer schools, lectures, gallery talks. Creative and receptive. Fine arts (visual), applied arts, and art history. Credit and noncredit. <strong>Program brochure available (print)</strong></td>
<td>HPAC Chicago (II): specialization in art education; <strong>Profile:</strong> visual arts (painting, drawing, photography) and applied arts (pottery), creative. Center Program for novice professional artist. 10 weeks. Noncredit. <strong>Program brochure available (print)</strong></td>
<td>VHS Chemnitz: specialization in art education; <strong>Profile:</strong> fine arts classes include: literature, performing arts, visual arts (receptive and creative); applied arts, art history, and exhibitions. One-year-Program for semiprofessional artists</td>
<td>Akademie der Staatlichen Museen zu Berlin (IV): specialization in art education; <strong>Profile:</strong> art history classes (series of 4, alongside exhibitions), mostly receptive; for adult learners at every age, including university art students. Noncredit</td>
<td>Kunstsammlungen Chemnitz: specialization in art education; <strong>Profile:</strong> classes are loosely coupled with exhibitions; based on a combination of guided and unguided tours and creative activity; mostly visual arts but also applied arts. Noncredit. No program brochure</td>
</tr>
</tbody>
</table>
and online) university art students. 10 weeks. Noncredit. Program brochure available (print and online) accessible. Noncredit Program brochure available (print and online) available

Social milieu: present or future professionals in applied arts; nonprofessionals (upper) middle class and citizens of Chicago

Social milieu: (upper) middle class citizens of Hyde Park and overall Chicago; professionals in visual arts; college students from the university of Chicago; high school students

Social milieu: (upper) middle class citizens of Chemnitz, mixed age groups

Social milieu: (upper) middle class citizens of Berlin, more elderly but also mixed age groups

Social milieu: (upper) middle class citizens of Chemnitz, mixed age groups

Community outreach: Chicago Community outreach: neighborhood and Chicago Community outreach: Chemnitz and neighborhood (city center) Community outreach: Chemnitz Community outreach: Chemnitz

Table 4: Institutions of art education and their characteristics

Among the cases, the VHS and the Art Institute (SAIC) have the broadest and the most differentiated programs for art education. The VHS even has a more significant profile in art education (16,3 % in 2010, cf. Huntemann/Reichart 2010, p. 29) than the US-American Community College where less than 5% of the programs range in this field (cf. http://www.aacc.nche). On the other hand, the early 20th century tradition of art centers (here: HPAC) seems to be more continuous in the USA than in Germany. In both countries, we can see an increase of learning activities in museums, but their degree of institutionalization varies and their funding is mixed. Only SAIC in Chicago and the Akademie der Staatlichen Museen zu Berlin are examples of museums with genuine education institutions.

Furthermore, only the established US-American institutions like SAIC and HPAC offer career development programs for visual (SAIC) and applied artists (HPAC, only recently). Both reflect on the general tendency of the US-American (adult) education system towards higher education and professional development. In the case of SAIC, established over 100 years ago, continuing education programs were initiated thanks to the existence of higher education programs at the school. Yet, they currently develop into a less successful branch of SAIC since community art centers like HPAC attract the clientele. Within the sample of German institutions only the Akademie der Staatlichen Museen zu Berlin concentrates on programs that resemble higher education in art history. At the same time it so far lacks funding for an actual degree or certificate program since there are sufficient publicly funded higher education institutions in Germany who do the job. In this respect, also the one-year program (no degree) for (semi)professionals and university art students at the VHS Chemnitz functions as a supplementation to its adult education courses. With its range, the VHS Chemnitz reaches a certain share of upper middle class citizens, while otherwise attracting ‘middle’ middle class milieus mainly (cf. Tippelt et al. 2008).

On the other hand, the VHS with the ‘TIETZ’ has an overwhelming physical and social presence in the rather depopulated city center of Chemnitz, a deindustrialized city that looks for a new image as a place for art, new technologies and trade (see also the contribution of the Kunstsammlungen). However, the most impressive example of socially sustainable community outreach is HPAC Chicago. It serves as an educational institution, a gallery, an atelier and a community center where citizens and high school students spend their afternoons. In general, this underlying idea of community outreach is more common in the USA than it is in Germany, due to the fragmentation of the social milieus and the deregulation of welfare policies as depicted in section 2. Regardless the fact that Hyde Park is less fragmented than other neighborhoods in Chicago (but more fragmented than most German neighborhoods), HPAC is special in terms of accessibility. It is a famous hallmark in the landscape of cultural and educational institutions in the neighborhood as well as in Chicago. On the other hand, fees for programs are up to $285 for ten weeks whereas they are around $50 at the VHS.

3.2 Concepts of art education

Accordingly, the concepts vary between the countries as well as between the institutions. For instance, while the teaching and learning methodology is equally active and receptive in the German institutions it seems to be a little more active in the US-American institutions. Furthermore, except for the Kunstsammlungen, as a museum for modern and contemporary art, the institutions in the USA seem to relate more constitutively to present contemporary art. This may be the result of the explicit contribution of the USA to 20th and 21st century art as well as of the case institutions’ commitment to career development programs. In the case of HPAC, this commitment also relates to black art and other community topics. Such a focus seems to be attractive for participants in Germany, too – at least for the upper middle class participants in the sample.

Apart from these cross-cultural differences the three German institutions and HPAC, which do not (predominantly) offer career development programs but

\textsuperscript{23} Moreover, I did not observe any kind of prejudice against applied art in the USA.
open classes focus on knowledge, creative/hermeneutic skills and techniques as well as art production. Within this framework, the *Akademie der Staatlichen Museen zu Berlin* has the most systematic receptive approach to art and art history, combining knowledge and reflection of esthetic experience and relating to a world famous collection (cf. Gieske 2005). On the other hand, the *Kunstsammlungen Chemnitz* resembles HPAC regards to the directness of aesthetic experience since classes partly take place in the museum itself (HPAC: near the gallery).

Table 5: Concepts of art education and their characteristics

<table>
<thead>
<tr>
<th>SAIC Chicago (I)</th>
<th>HPAC Chicago (II)</th>
<th>VHS Chemnitz (III)</th>
<th>Akademie der Staatlichen Museen Berlin (IV)</th>
<th>Kunstsammlungen Chemnitz (V)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access to reception and production of art – aims of art education</td>
<td></td>
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<tr>
<td>Mainly professional development; open classes with →</td>
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<td>Predominantly active</td>
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<td>Predominantly active</td>
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<tr>
<td>Teaching and learning methodology</td>
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<tr>
<td>Highest – examples for programs in the fall of 2012: computer design, beg figure drawing, painting and drawing with “traditional and non-traditional [...] materials”</td>
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<tr>
<td>High – examples for programs in the fall of 2012: center program, advanced digital photo, large scale painting, but also classical portrait painting</td>
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<tr>
<td>Medium – examples for programs in the fall of 2012: challenging your own ways of artistic expression, diversity in art, ceramics for Christmas</td>
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<tr>
<td>Low/medium – examples for programs in the fall of 2012: baroque and rococo; Bega and Vermeer, German art from 1945–1970</td>
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<tr>
<td>Medium/high – examples for programs in the fall of 2012: graphic design, art prints, different techniques of painting</td>
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<tr>
<td>Commitment to (current developments in) contemporary art</td>
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<tr>
<td>Predominantly active</td>
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<tr>
<td>Predominantly receptive</td>
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<tr>
<td>Predominantly active</td>
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<tr>
<td>Predominantly active</td>
<td></td>
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</tbody>
</table>

3.3 Benefits of art education

Benefits vary in terms of cross-cultural as well as cross-institutional comparison. Obviously, students at SAIC and HPAC benefit from the programs for career development. Participants of the HPAC center program state that the range of learning opportunities both non-formal and informal (atelier) and the guidance they get helps them to develop technical and artistic abilities, stable motivations, professional self-esteem, and visions for their careers. Furthermore, the program helps them to relate their personal development to processes of community building. Some, but very few of these benefits were also reported for participating semiprofessionals and university students (the sample itself did not encompass these groups) at the *Akademie der Staatlichen Museen zu Berlin* and at the *VHS Chemnitz*.

Very differently, benefits in regard to the optimization of personal happiness and intrinsic motivation through knowledge, hermeneutical or creative skills, art production and contemplation were subject of the interviews at the three German institutions and HPAC. Participants explained how learning effects in these areas brought about an improvement of self-awareness (taste, self-esteem, emotional stability) and awareness of others. Participants at the *Akademie der Staatlichen Museen zu Berlin* reported self-directed learning activities alongside the lectures since they are eager to deepen their knowledge. Moreover, all participants from open classes in the sample were very clear about their motivations: their desire for aesthetic experience or a different facet of their identity or expertise or biographical patterns of artistic activity (see also Görner-Schipp 2012). Education directors/program planners stressed the benefits of both experiencing creative capacity and taking an aesthetic or useful product home (the latter notably stressed at the VHS). Moreover, they emphasized the opportunity to learn a broad range of techniques over the life span. Particularly at the VHS and at HPAC there are different levels of mastery, according to different learning aims. In the *Kunstsammlungen Chemnitz*, this idea corresponds with experiential and experimental self-directed but supervised art production. This is also a facet of the HPAC learning environments, thanks to the atelier. Participants also stressed the fact that they can make use of materials and tools provided by the institutions. Hardly touched were the limits of adulthood learning abilities in regard to techniques (though weaker in visual art than i.e. in music). However, the joy of producing art and mastering techniques on whatever level was reported in every interview of the sample – but it is so far hardly addressed in the literature.

Benefits related to critical thinking and community building were emphasized in the Chicago sample, notably at HPAC, thanks to its accessibility and topics. Among the German institutions the VHS Chemnitz serves as a community center. Benefits of creativity and analytical skills useful in the workplace have been reported at the VHS, resulting from the combination of receptive and systematic classes. However, besides the aspect of creativity, which is hard to measure, participants in the open classes of all case institutions stressed the effects of deep relaxation in both creative and receptive classes. Finally, in both countries and all five institutions interview partners reported on chains of benefits developing over the time (i.e. from short-term satisfaction to long-term emotional stability).

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14 There are other stories from Chicago learning venues such as theatre that bring about community development (cf. Donoho 2005).

15 In this respect we have to take into account the challenge of the validity of the sample since most of the interview partners were long-term participants.
Thus, scholars have pointed to the more emphatic approach to adult education back in the "Bildung") of less institutionalized learning venues in both countries. As brands, the respective institutional effects of deregulation as well as the "pervasiveness" established, accepted and wide-ranging in terms of mission and specialty. At the Volkshochschule Chemnitz institutionalized provision of adult (art) education. I would like to single out the and vocational education, the simultaneous emphasis on liberal arts college its deregulation of welfare policies and its focus on basic skills, post-secondary public funding is decreasing. And it is true for the US-American situation with administrators tend to underestimate them. This is true for Germany where lifelong learning and social cohesion. Nonetheless, policy-makers and differentiated benefits. Art-related learning activities are an important factor of Table 6: Benefits of art education and their characteristics

<table>
<thead>
<tr>
<th>SAIC Chicago (I)</th>
<th>HPAC Chicago (II)</th>
<th>VHS Chemnitz (III)</th>
<th>Akademie der Staatlichen Museen Berlin (IV)</th>
<th>Kunstsammlungen Chemnitz (V)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefits for participants Instrumental use regards to career development (work-related optimization)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>Not directly/ only for semiprofessionals</td>
<td>Only for semiprofessionals</td>
<td>Not directly</td>
</tr>
<tr>
<td>Optimization of personal happiness and intrinsic motivation as well as self-esteem and self-improvement through knowledge, skills, creativity and contemplation</td>
<td></td>
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<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
</tr>
<tr>
<td>Chains of benefits</td>
<td></td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
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<tr>
<td>Possible benefits for enterprises (participants' workplace) as we might defer them from the interviews with participants</td>
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<tr>
<td>Benefits with regard to creativity and analytical skills in the workplace</td>
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<td>Yes</td>
<td>(Yes)</td>
<td>(Yes)</td>
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<tr>
<td>Possible benefits for the society as we might defer them from the interviews with program planners (social justice, community outreach)</td>
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<tr>
<td>Benefits with regard to critical thinking and community building</td>
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<tr>
<td>(Yes)</td>
<td>Yes</td>
<td>(Yes)</td>
<td>(Yes)</td>
<td>(Yes)</td>
</tr>
</tbody>
</table>

Table 6: Benefits of art education and their characteristics

4. Conclusion

My findings in five institutions of art education for adults reveal its great and differentiated benefits. Art-related learning activities are an important factor of lifelong learning and social cohesion. Nonetheless, policy-makers and administrators tend to underestimate them. This is true for Germany where public funding is decreasing. And it is true for the US-American situation with its deregulation of welfare policies and its focus on basic skills, post-secondary and vocational education, the simultaneous emphasis on liberal arts college education decoupled from adult education.16

Against this background, I would like to highlight the importance of institutionalized provision of adult (art) education. I would like to single out the Volkshochschule Chemnitz and the Hyde Park Art Center Chicago as two examples of particularly good practice that could match the needs of urban community contexts in Germany and in the USA. Both institutions are very well established, accepted and wide-ranging in terms of mission and specialty. At the same time, they have developed as brands according to the zeitgeist and facing the respective institutional effects of deregulation as well as the "pervasiveness" (cf. Merriam/Brockett 2007. p. 108; see also Gieseke u.a. 2005 on „beigeordnete Bildung") of less institutionalized learning venues in both countries. As brands, they are distinct and thus more ‘borrowable’ than ever. Furthermore, the VHS with its public funding and relatively low fees is the most institutionalized educational institution not only in the sample but also in the field. It is backed by a system of subsidized public funding. Of course, this approach is more typical of European welfare states, especially the German post-1945 welfare state. However, given the struggles local communities and cultural/educational institutions in the USA are facing (even more so with the economic crises) the benefits of public funding are undoubtful. Against this background, most institutions in the overall sample might also benefit from a greater commitment to credit and certificate programs that actually document the benefits of art education.

Germany, on the other hand, may learn lessons regarding the positive effects of community building in the USA (cf. Merriam p. 114, 149, 189; Wiessner et al. 2010; Zeuner 2006). But it will have to take into account the specific conditions of social segmentation and fragmentation, which are very different in both countries. Present approaches to community building and social space („Sozialraum“) in the German adult education discourse should be evaluated against this background. Furthermore, we need solutions for the middle-class and upper-middle-class bias in art education. Interestingly, where German institutions imitate the US-American tendency towards higher education they even reinforce this bias, whereas US-American institutions ideally do not. On the other hand, the commitment of the middle class milieus sustains the existence of open adult education institutions, even more so since they identify with “their” institution over the time. This very general idea is clearly supported by my findings on VHS and HPAC. Finally, the increase and differentiation of learning activities in museums in both countries is a positive sign but needs reliable funding and the will for institutionalization as we can defer from the examples of SAIC, Kunstsammlungen Chemnitz and Akademie der Staatlichen Museen zu Berlin.

As far as the concepts of art adult education go, it would be interesting to adopt, access and interpret discussions and categories in present contemporary art – especially community mobilization, environmental protection, and the cultivation of space. Another aspect would be the systematic approach to inter-, trans- and multiculturalism since art is so global and since creative art education does not require elaborate oral language skills. Finally, such concepts may relate to more general theoretical developments in the field of adult education, such as lifelong learning and emotions, biographies and time (cf. Gieseke 2009; Schmidt-Lauff 2008), transformative learning (cf. Lipson Lawrence 2005a) and social media, community education as civic education (cf. Zeuner 2006) or learning in transcultural, diverse and hybrid (world) societal settings (cf. Robak 2012; Egetenmeyer 2008; Boucouvalas 1999, p. 69 ff.; Brookfield 2010).

16 Thus, scholars have pointed to the more emphatic approach to adult education back in the 1950s–70s (cf. Merriam/Brockett 2007, pp. 110f.; 125 ff.; 178; Edelson 2000, p. 8f.).
Ayo Garuba, Department of Continuing Education and Community Development, Ibrahim Badamasi Babangida University, Lapai, NIGERIA, ayogaruba@gmail.com

**Adult Literacies as Social Practice: Some Lessons for Nigeria from Scotland**

**Abstract**

This is part of the report of an exploratory study designed to investigate the rationale, process and outcomes of Scotland’s national adult literacy numeracy policy. Funded by the British Academy under her Visiting Research Fellowship Award, the study sought to examine the policy and the practice of Scotland’s approach with a view to identifying its potential benefit to the improvement of adult literacy policy and practice in Nigeria. The study focused on the context, the policies and the practice of literacy as implemented in Scotland. The aim here is to explore how the social practices approach to literacy operates in Scotland and the lessons that could be learned to inform policy and practice of adult literacy in Nigeria. Specifically, the study focused on the following four research questions.

1. What is the rationale for Scotland’s social practices approach to literacy?
2. How does the approach operate in practice?
3. How are the learning achievements perceived in terms of addressing the concept of capability poverty as discussed, for example, by Sen (1999)?
4. What lessons can be learned from the Scotland approach to inform policy and practice in Nigeria?

The preliminary report of the study indicates that Scotland literacy practice is associated with learner freedom especially in the choice of learning content. This does not compare with Nigerian practice which still conceives literacy as a set of mechanical skills and which does not give the learner any measure of freedom on what to learn. Unlike Nigeria where the traditional primer based model of literacy training is still the dominant approach to literacy teaching, Scotland conception and practice of adult literacy falls within the social practice model with its emphasis on literacy learning which emerges from issues which learners on their own, have identified as important and key to their social living. Compared with Nigeria literacy model that tends to isolate the learner from the content and use of learning experience, the Scottish literacy model forges a potential link between literacy development and capability enhancement.

Implementation of social practice model of literacy in Nigeria is quite feasible and desirable but certain challenges especially in the area of low concept of the model among literacy practitioners and policy makers will have to be addressed.
Introduction

This paper draws on the report of a study designed to assess the value of the Scotland’s adult literacy and numeracy strategy to Nigeria. The study focused on the context, the policies and the practice of Adult Literacy and Numeracy (ALN) as implemented in Scotland. The aim here is to explore how the social practices approach to ALN operates in Scotland and the lessons that could be learned to inform policy and practice of adult literacy in Nigeria.

Funded by the British Academy under its visiting scholars programme, the study was carried out as a Visiting Research Fellow during a four month residency at the Centre for Research and Development in Adult Literacy in Lifelong Learning (CRADALL), University of Glasgow, Scotland.

The study

The study adopts a qualitative design with focus on perceptions from the point of view of researchers, policy implementers, practitioners and learners themselves. Four focus research questions have been posed to guide the conduct of the study as follows:
1) What is the rationale for Scotland’s social practices approach to literacies?
2) How does the approach operate in practice?
3) How are the learning achievements perceived in terms of addressing the concept of capability poverty as discussed, for example, by Sen (1999)?
4) What lessons can be learned from the Scotland approach to inform policy and practice in Nigeria?

Sampling was purposeful and it reflected the context specific nature of the study. Methods consist of 12 structured interviews with individuals and four focus group meetings (of approximately seven people in each) with learning groups who are identified through the local authority ALN partnerships. Members of the focus groups were also invited to participate in individual interviews for further clarification of any issues raised during discussions. The study also involved face to face interviews with researchers, providers and learners in Nigeria and Scotland. Data were analysed inductively and coded with the aid of Nvivo software, clustered into themes to represent key insights and issues.

This paper is a brief comparison of the policy and practice of adult literacy in Scotland and Nigeria. The essence here is to identify the potential gains which Nigeria can derive from the implementation of a social practices model of adult literacy and the challenges that are likely to be encountered in the process.

ADULT LITERACY PRACTICES IN SCOTLAND

Devolution of government in the United Kingdom (which is now a four nation state comprising England, Ireland, Scotland and Wales) and the resultant creation of Scottish Government in 1999 came with its attendant divergence in social policy. This four-in-one arrangement now means each part (of the four) presenting its own approach, history and characteristics in education and other social services. One area where this divergence has been most pronounced is in the adult literacy and numeracy policy framework. For instance, while the English Model of Adult Literacy emphasises skills for life, Scotland adopts literacies as social practices. This invariably “results in goals that are strikingly different from the skills for life strategy in England” (Merrifield, 2005; 20).

Scotland’s poor performance in the 1996 International Adult Literacy Survey (IALS) in twenty countries including Australia, Belgium, Canada, Germany, Ireland, the Netherlands, New Zealand, Poland, Sweden, Switzerland and the United States is one of the major reasons which necessitated a refocus of the adult literacy policy and programmes in the country. The result of the survey for Scotland indicated that “23% of the adult population) are estimated to have low literacy and numeracy skills according to the International Adult Literacy Survey (IALS)” (Sliwka. and Tett 2008; p. 5).

The adoption of literacies as social practices by Scotland can, however not be considered in isolation of her long history of community education practices (Tett, 2010). Early in 1977, the Working Party on Professional Education and Training for Community Education has highlighted on the major elements of community education as follows:

We consider the concept of community education to be consistent with current international thinking about education as a whole, as represented for example by the phrases ‘education permanente’, ‘recurrent education’, and ‘continuing education’. It reflects a view of education as a process (a) which is lifelong; (b) in which the participants should be actively and influentially involved and the traditional stress on teaching outweighed by the emphasis put on learning and (c) in which the needs of the participants rather than the academic subject divisions or administrative and institutional arrangements should determine the nature and timing of provision. (HMSO, 1977: 6)

It is against the above background that literacy is conceived as a key dimension of community regeneration and a part of the wider lifelong learning agenda (Scottish Executive, 2005). The strong community education background of the Scottish nation has constituted the equally strong ‘push’ and ‘pull’ factor in her adoption of the social literacies approach. For instance, adult literacy and numeracy programme was initially located in the defunct Communities Scotland (a government agency that worked with other Scottish government agencies for the improvement of quality of people in the country) and not in the education department as expected while the implementation team of the policy still form part of the community engagement activities in the country.

Adult literacy Policy and Curriculum

The journey to new adult literacy model started in 2000 when the Scottish Executive commissioned the Literacies in Community Report. The report was quite significant in the development of adult literacy policy and practice in the
whole of UK as emphasis was shifted “from seeing literacy as functional skills towards seeing it as a set of real-life practices” (Merrifield, 2005; 20).

A key report, ‘Adult Literacy and Numeracy in Scotland’ (ALNIS) was published in 2001. It recognised that ‘Literacy and numeracy are skills whose sufficiency may only be judged within a specific social, cultural, economic or political context’ (Scottish Executive, 2001, p. 7). ALNIS further defined ALN as: "The ability to read, write and use numeracy, to handle information, to express ideas and opinions, to make decisions and solve problems, as family members, workers, citizens and lifelong learners" (Scottish Executive, 2001; p. 7)

The curriculum is one area where Scotland adult literacy and numeracy strategy offers a best practice example of a practical approach to adult literacy project. There is an Adult Literacy and Numeracy (ALN) framework which unequivocally states that:

We are using a social practices account of adult literacy and numeracy. Rather than seeing literacy and numeracy as the decontextualized, mechanical, manipulation of letters, words and figures this view shows that literacy and numeracy are located within social, emotional and linguistic contexts (p. 3). Many literacy and numeracy events in life are regular, repeated activities, such as paying bills, sending greetings cards, reading bedtime stories and some events are linked into routine sequences that are part of the formal procedures and expectation of social institutions such as work-places, schools and welfare agencies (Scottish Executive, 2005; p. 3).

The ALN curriculum framework has been designed to achieve three main purposes as follow:

- promote the Scottish philosophy and approach to adult literacy and numeracy in whatever context they are delivered
- show how this can be done with the learner at the centre of the process
- improve the quality of Scottish adult literacy and numeracy provision

(Scottish Executive, 2005; p. 7).

The Scottish philosophy and approach to ALN is an inclusive policy that is tailored towards meeting the learning needs of different categories of youths and adults including:

1. those with low literacy skills
2. jobless and unemployed including those facing redundancy
3. those with English as second language
4. people with disabilities and health conditions
5. those living in disadvantaged areas
6. those on low skilled jobs (Tett, Leavey, & Sliwka, 2008).

In terms of feature, adult literacy and numeracy education in Scotland is associated with curricular diversity, voluntariness, and learner-based methodology. There is intense focus on the different uses to which adults make of literacy or the ways in which literacy is reflected in their lives as individuals and as “family members, workers citizens and lifelong learners” (Scottish Executive, 2001; p. 7). The learner’s right to choose and determine what and when to learn is fully recognised. The policy:

- rather than focusing on a minimum standard, is concerned more with establishing what the learner’s goals are ... The aims is to access learners’ ability to apply their learning to real contexts to measure and to measure the economic, personal and social gains that they make, including their willingness to learn in the future (p.14).

The curriculum is thus about the learner with particular emphasis on the different social contexts in which s/he uses literacy and numeracy and the main focus being on equipping him/her with the particular skills and knowledge required for effective social and economic living.

Equally worthy of note is the fact that Scotland ALN policy was informed by research evidence. According to Leavey (2005) “The adult literacy and numeracy strategy in Scotland is built on what was learned from a number of different research projects as well as a number of UK and international adult literacy programmes” (p.22). . In addition to IALS, other research projects were specifically commissioned to provide further evidence to inform the policy. These include; further analysis of the Scottish IALS (1996) data, the Workforce Survey - a household survey of the workforce, the Employers Survey – Scottish employers’ views of literacy and numeracy in the workplace (Scottish Executive, 2001; p. 8).

The implementation of the policy is built around 32 ALN Partnerships that form the nucleus of contact with adults who have literacy needs on the one hand and providers of ALN across all sectors including colleges on the other. The partnerships enjoy some measures of freedom in defining the content and context of ALN in their respective areas of authorities.

Since the implementation of the new ALN policy started in Scotland, appreciable progress has been recorded especially in the area of improved capacity of people to handle text and other literacy and numeracy tasks. As reflected in the report of the evaluation of the 2009 Scottish Survey of Adult Literacies (SSAL) “Literacies in Scotland are generally strong … [which] means that the majority of Scots have skills at the level considered appropriate for an advanced economy by the OECD” (St.Clair, Maclachlan and Tett, 2009). This can be a remarkable improvement over the country’s performance at IALS.

**Adult Literacy and Numeracy Policy and Practices in Nigeria**

Nigeria obtained her independence and republican status from Britain (the present UK comprising England, Northern Ireland, Scotland and Wales) in 1960 and 1963 respectively. This, by implication, makes Scotland a colonial master to Nigeria, a vast and ethnically diverse nation with more than 250 ethnic groups (Udebu, 2011) at least three of which are more than the size of the UK, the four-in-one country former colonial authority. Nigeria’s population is presently estimated at 162.5 million (World Bank, 2011). The 2010 National Literacy

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References:

1. Leavey, A. (2005). “The adult literacy and numeracy strategy in Scotland is built on what was learned from a number of different research projects as well as a number of UK and international adult literacy programmes.”
Survey conducted Jointly by the National Mass Education Commission (NMEC) and the National Bureau of Statistics (NBS) put the national literacy rate for the country at 56.9% (NMEC & NBS, 2010). The survey further revealed that Nigeria houses about 40 Million people who are unable to read and write in any language out of which only 500,000 (0.13%) are currently enrolled in adult literacy classes. With such a huge population of illiterates, it is not surprising that Nigeria is a prominent member of the E9 countries (and the only one from Sub Saharan Africa (SSA) meaning that she is among the nine countries with highest population of illiterates in the world along with Bangladesh, Brazil, China, Egypt, India, Indonesia, Mexico, and Pakistan. Nigerian is the present chair of the E9 group. Thus, adult literacy remains a big issue in the resource endowed Nigeria.

Nigeria has made considerable efforts to address the adult literacy issue. The efforts have been largely in the area of mass literacy campaigns and policy. In the 1977 National Policy on Education (NPE) which was subsequently reviewed in 1981, 1998 and 2004, the Federal Government of Nigeria (FGN) declared that “an intensive nation-wide mass literacy will be launched as a matter of priority” (FGN, 2004, p. 35). Resultantly, the country conducted various mass literacy campaigns with all aiming at eradicating illiteracy in the country. Apart from the national campaigns, states also conduct campaigns to address areas of needs. Presently, Kano, one of the states in the North West region recently (in May, 2012) launched its own mass literacy campaign tagged ‘Building a Learning Society initiative’. According to Mallam Rabiu Kwankwase, the State Governor, the mass literacy campaign is “aimed at ensuring that every adult in the rural and urban areas of the state becomes literate by 2015, (Ehiabhi, 2012). In terms of campaign strategies, the each-one-teach-one or fund-the-teaching-of-one (EOTO or FOTO) has been widely used.

The Policy

There is also a strong policy structure to support adult literacy and numeracy provisions. Mass literacy, adult and non formal education is contained in section 7 of the National Policy on Education, 2004. The policy defines Mass literacy, adult and non formal education as encompassing “all forms of functional education given to youths and adults outside the formal school system such as functional literacy, remedial and vocational education (FGN, 2004, p. 36). The objectives of adult and mass literacy as stated in the policy are as follow:

1. To provide functional literacy and continuing education for adults and youths who have never had the opportunity of formal education or who did not complete their primary education. These include the nomads, migrant families, the disable and other categories or groups. Especially the disadvantaged gender
2. To provide functional and remedial education for those young people who did not complete secondary education
3. To provide education for different categories of completers of the formal education system in order to improve their basic knowledge and skills
4. To provide in-service and on-the-job vocational and professional training for different categories of workers and professionals in order to improve their skills and
5. To give the adult citizens of the country aesthetic, cultural and civic education for public enlightenment (FGN, 2004, p. 19).

There is a tripartite administrative framework in the implementation of the policy on adult literacy education in the country. At the head of the structure is the National Commission for Mass Education which is in charge of policy, monitoring and evaluation of literacy programmes, standard and quality control, development of curricular and didactic material, personnel training and collaboration with Non Governmental Organisations and International Development Agencies. Each state has a Mass Literacy Agency with responsibilities for policy implementation at state level, planning and research and coordination of state based NGOs as well as “provide support services for adult and non-formal education including curriculum development, mobile and rural libraries, television viewing and audio-listening centres, and studio –visual teaching and learning aids” (FGN 2004, 38). All the Local Government Authorities (LGAs) have adult education unit that sees to the day-to-day control and administration of local mass literacy and adult education programme. This tripartite arrangement reflects the three tier structure of governance in the country.

The seemingly extensive policy provision on mass literacy, adult and non formal education appears in tandem with the position of Faure et al (1972), when they declared that illiteracy is an aspect of underdevelopment and as such, literacy training should form an integral part of any development undertaking. Providers of adult literacy education include government, religious institutions, nongovernmental organisations, International Development Agencies, Trade Unions and Employers of Labour (Garuba, 2007).

Nigeria has had a long a long history of mass literacy campaigns starting from 1940s. The campaigns have been of long term duration. Prominent among these are the 1974-1982 and 1982-1992. Despite a developed adult education and successive but largely unsuccessful literacy campaign strategies the problem of illiteracy in Nigeria has been very intractable (Omolewa, 1988). In its bid to further address the adult literacy issue in the country, the government has started a programme of revitalisation of adult and youth literacy in collaboration with UNESCO. The project aims to “educate 4 to 5 million illiterate adults and 2 million out-of-school children over the next three years” (UNESCO, 2012; p. 2).

Generally, adult literacy programmes have always been primer based with strong emphasis on enrolment and participation of adults in literacy centres. It has always been the provider determining the nature and content of what is to be
learned by adult literacy learners. Even in the ongoing revitalisation of youth and adult literacy programme, there is still emphasis on production of literacy primers. As a matter of fact, part of the strategic framework for the programme is to produce about 5million primers and textbook for use of instructors (UNESCO, 2012). The problem with primer based literacy is that the learner is virtually isolated from the learning content. The primer leaves too little role for the learner in the teaching-learning instruction as the teacher assumes full responsibility for the determination and interpretation of the learning content.

University Adult Education and Literacy Practice
Nigeria can be said to have a developed and vibrant adult education movement with a long history of andragogy at higher education level especially when considered against the limitations imposed by human and material resources. University adult education actually started with the establishment of the then Extra Mural Studies department (now the Department of Adult Education) at the University of Ibadan in 1949. The department was saddled with the responsibility of grappling with the problems of adult education throughout the country . . . [and] to make a large section of the country as possible university – conscious” (Anyanyi, 1987, p. 119). In addition to being the first Department of Adult Education on the Continent, the department was the host of 1991 International Conference of the Committee for Study and Research in comparative Adult Education, (CSRCAE), the precursor of ISCAE and a winner of the UNESCO International Reading Association Literacy Prize in 1989. Presently, not less than thirteen other universities in the country run programmes ranging from certificate to doctoral degrees in adult and non formal education. These universities and the scholars have contributed very immensely to development and research in adult literacy education in the continent of Africa.

In addition to research, scholarship and personnel preparation, universities have, through their extension services contributed greatly to the promotion of ALN in Nigeria. A typical example is the University Village Association (UNIVA) concept developed by the University of Ibadan.

Comparing Adult literacy and Numeracy Strategies in Nigeria and Scotland
From the brief adult literacy and numeracy profile of Nigeria and Scotland presented in earlier sections of the paper, it is clear that there are glaring dissimilarities in the conception and practice of adult literacy. In table 1 below attempt is made to juxtapose literacy policy and practice in the two countries with emphasis on the major points of departure between the two in key areas of literacy.

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<table>
<thead>
<tr>
<th>Elements</th>
<th>SCOTLAND</th>
<th>NIGERIA</th>
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</thead>
<tbody>
<tr>
<td>Policy</td>
<td>A clear policy with a clear statement of objective and modalities for implementation</td>
<td>A general education policy with a section on mass literacy and adult education</td>
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<tr>
<td></td>
<td>Policy matched with implementation</td>
<td>Gulf between policy provision and implementation</td>
</tr>
<tr>
<td></td>
<td>A bottom up arrangement that promotes participation across all stakeholders</td>
<td>Usual top down approach with literacy conceived and delivered for ‘illiterates’</td>
</tr>
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<td></td>
<td>In addition to IALS four research projects commissioned to inform the new policy</td>
<td>Social policy rarely benefits from research as there is a wide gap between researching institutions and policy makers and implementers who continue to operate within the national bureaucratic structure.</td>
</tr>
<tr>
<td>Conception of literacy</td>
<td>Social practice, embedded within other learning activities as well as other individual or community engagements</td>
<td>Traditional with emphasis on literacy and numeracy as skills. Emphasis on textual literacy and numeracy Primer based</td>
</tr>
<tr>
<td>Learner Participation</td>
<td>Programme designed with learners and essentially based on identified needs and circumstances of individuals.</td>
<td>Designed for learners with instructor practicing within prescribed curriculum</td>
</tr>
<tr>
<td>Curriculum</td>
<td>Full of diversity and provide options to meet learner needs and aspirations of learners</td>
<td>Traditional with focus on acquisition of basic skills of reading and writing, lack of curriculum content that speaks directly to the experiences of people Apparently for noninvolvement of the learner, the curriculum does not speak directly to the experience and unique needs of people without literacy.</td>
</tr>
</tbody>
</table>
| Training and professional development for literacy tutors | Adult Literacy and Numeracy Partnerships offer introductory training in adult literacies work in each local authority area. Training programmes lead to certificate in Tutoring Numeracy in Adult Literacies. There is also the Teaching Qualification: Adult Literacies (TQAL) Certificates recognised within national qualification framework | a. Training essentially on ad-hoc basis provided for the newly employed literacy instructor usually by organizers of the programme with a certificate of participation issued to participants at the end of training  
 b. Emphasis of training is on re-skilling of existing basic education teachers to teach literacy on part-time basis  
 c. Certificate obtained at the re-skilling and other ad-hoc programmes not recognized within national qualifications framework  
 d. Universities and some other tertiary institutions offer certificate, diploma, graduate and postgraduate programmes in adult education but such programmes are more academic than field based. |
| Literacy Teaching                 | Involvement of highly educated with majority being degree holders         | Mainly secondary school leavers.                                        |
| Administration and institutional arrangement | Adult literacies project located within Communities Scotland with Learning Connection as the anchor structure Adult Literacy and Numeracy Partnerships form nucleus of organisation at the local level and this enable wider reach as literacies learners are accessed closed to (or even in) | Adult and non formal education sections of ministries of education at the Federal and State levels. There is a National Commission for Mass Literacy at the centre A Mass Literacy Agency in each of the 32 states and the FCT. |
For Nigeria and Scotland, this borrower-lender imbalance can be quite apparent given the fact that the former was a British colony and there is still a considerable measure of British influence around. As a matter of fact, English is not only the official language but remains the language of wider interaction. It is not unusual for scholars to allude to the problems of Nigerian education to its colonial past. Not even when the nation made a bold step of ‘changing’ from the British system to 6.3.3.4 education of American orientation. Nigeria still remains strongly tied to western influence as “Certain historical antecedents have impact on how educational policies are formulated and implemented in the country” (Fabunmi, 2005: 3). Though as earlier alluded, borrowing is not supposed to be a one-way traffic, Nigeria has continued to be a passive recipient of educational ideas and policies from Britain and other countries of the North. This is not surprising as “the West’s monopolistic control over the nature and the flows of knowledge remains in place, even decades after colonized territories achieved political independence and nationhood” (Takayamaa, and Apple, 2008; p. 290).

Be that as it may, one can still not gloss over the fact that a comparative analysis of adult literacy practices in Nigeria and Scotland will serve to enrich the latter as facts from the country situations presented earlier in this paper tend to reveal that the latter has much to offer and this is the stark reality we shall be facing as we highlight on the lessons Nigeria can learn from Scotland dynamic approach to adult literacy and numeracy learning.

**LESSONS FOR NIGERIA**

As rightly pointed by Merrifield (2005):

>a grand experiment is going on in Scotland, one of the most dynamic and exciting places in the world right now to be an adult literacy or numeracy practitioner. The rest of us can only watch (with envy perhaps) as the story unfolds. So far, there is much to encourage us that a social practices approach can be operationalised not just within the classroom but at a national policy level… We all have much to learn and Scotland is helping move the whole field forward (p. 22)

There is no doubting the fact that the literacy and numeracy model as currently designed and implemented in Scotland holds a lot of promises for Nigeria in her present efforts to universalise access to basic education and promote an inclusive society where individuals’ capacities and capabilities are brightened and broadened. However, wholesale or full scale adoption of the Scotland practice may be unrealistic as it may be grossly unfair and mistaken to use the lens of Scotland to gauge Nigeria literacy policy and practices. The point however, remains that Nigeria adult literacy policy and practice needs to be aligned with global reality, a reality which Scotland has not only aligned with (through the adoption and implementation of social literacies approach) but she is facing headlong. Scotland social literacies approach to adult literacy and numeracy thus offers a lot of lessons and promises to Nigeria. Some of these are highlighted below.
1. The first major lesson which Nigeria has to learn from Scotland approach to literacy that research is of great essence in design of social policy. As earlier stated, the Scottish model benefited extensively from research. This is unlike in Nigeria where there is a gulf between research and practice and between research institutions and policy makers. As posited by Adelakun (2012), “except a pragmatic approach is taken to promote the application of research findings to development, attainment of the goals of adult and non formal education will be a mirage” (p. 12).

2. The starting point for Nigeria in the implementation of social practices model of literacy and numeracy is to conduct a Learning Need Assessment (LNA) of adults (including the vulnerable or disadvantaged ones) with limited or no literacy and numeracy skill. Just as the IALS was the beginning for Scotland, LNA may be our own take off point as it will serve to provide detailed information and required data for planning and decision making on the appropriate step to take to address the literacy issue in the country. LNA is not about assessment of literacy level but about knowing what the adult needs to know as a basis for literacy and numeracy intervention. A well designed and executed LNA makes ALN to respond to perceived needs of participants.

3. There is the need for more learner involvement in choice of what, when and where to learn. The choice of what to learn should essentially be that of the learner. The teacher is only to guide the learner and facilitate learning through the instrumentality of a curriculum that speaks directly to the learner and his/her peculiar needs.

4. It is also high time Nigeria revisited her vocational and technical education programmes. With a strong traditional apprenticeship culture in most parts of the country, what is needed is a restructure of the National Business and Technical Examination Board (NABTEB) and the National Board for Technical Education (NBTE) to allow for revaluation of qualifications and certificates obtained through apprenticeship to be contained within the national qualification framework. Here the Scottish Credit and Qualification Framework (SCQF) can be especially relevant.

5. There is the need for an integrated programme of awareness and confidence building that will see to (1) identification of literacy issues in the community and (2) re orientation of adults with literacy and numeracy needs and other stakeholders in the Nigerian project on the essence of literacy. With this, stigma associated with illiteracy will be contained. To this end, the Big Plus strategy in Scotland offers another evidence of best practice and is hereby commended for adoption to Nigeria. As usual, necessary modification that will suit our local peculiarities will have to be carried out.

Conclusion and Recommendation

This paper attempts a discussion of the transferability of Scotland Social Literacies approach to Nigeria. At the risk of getting drowned by challenges associated with wholesale importation of education idea and policies, the paper contents that in the context of Nigeria’s low rate of literacy achievement and the wider issues of poverty and social exclusion, a new approach that revisits the concepts of literacy and growth is desirable. Adult literacy has gone far beyond the old traditional way of explaining it as mechanical skill of reading and writing. The emphasis now is on the Social Uses of Literacy (SoUL).

There is the need for a closer link to be forged between policy makers and existing education research centres and institutes like the Nigerian Education Research and Development Council as a step towards a more research informed policies in the country. Establishment of a National Institute for Research in Adult and Lifelong Learning (NIRALL) to perform the role similar to that of the National Research and Development Centre for Adult Literacy and Numeracy (NRDC) performs in UK. Among others, NRDC “aims to improve practice in adult literacy, language and numeracy teaching and learning by creating a strong research culture and by developing professional practice” (NRDC, 2012) through collaboration and partnership with universities, institutes and other organisations with stakes in adult literacy.

In the context of Nigeria’s low rate of literacy achievement and wider issues of poverty and social malaise, a new approach that revisits concepts of literacy and growth is desirable especially given the fact that in spite of huge government expenditure on adult literacy and numeracy, the literacy rate of the country is still only 56.9% and women form the majority of the illiterate population. As the country is currently revitilising its adult literacy provisions, it behoves the government to look beyond the existing traditional primer based model of literacy education which tends to isolate the learner from the content of learning. Perhaps a little glance at the Scottish way might make the difference.

References


Fabunmi , M. (2005). Historical Analysis of Educational Policy Formulation In Nigeria:
The Validation and Recognition of Prior Learning (VRPL) in France, Spain and Italy

Introduction

The objective of this paper is to analyze similarities and diverging and converging trends in validation policies, practices and methodologies. This is why this reflection aims at characterizing European validation of non-formal and informal learning, to evaluate differences and commonalities between countries, precisely France, Spain and Italy to consider the potential for building a European approach. We present a cross-country analysis whose aim is to look at validation not only from a national perspective but also from an organizational and individual perspective. Key issues such as the number of people who have benefited from validation and/or the number of qualifications awarded for example are also covered. The domination of formal education is challenged when VRPL provides new possibilities for valuing learning and knowledge from informal and non-formal learning contexts. In some countries there may be structural barriers when a project needs to be expanded to a national level or be embedded in the apparatus of the educational system.

Mainly based on the information provided in the 2010 country updates, it is possible to group the countries according to their level of development or the approach they have taken to the development or implementation of a validation system – either centrally designed and managed validation initiatives or those which fundamentally rely on local project based initiatives. If all descriptive and analytical elements on categorisations however have clear limitations and do not make possible to group the countries according to their level of development or the type of VRPL, we consider that the number of people who have benefited from validation and/or the number of qualifications awarded for example are also covered.

The VRPL can be regarded as a vector making it possible to build bridges between various forms of cultures - of an educational, economic or social nature - resulting from behaviors and representations of the historically rooted actors, finally like the source of convergences or divergences.

European context of the Validation of Recognition of Prior Learning

The process of Recognition of Prior Learning is recognised as an important tool in the pursuit of economic and social goals at European level. Moreover, the long-term commitment to validation has been recently reinforced by the revised Strategic Framework for Cooperation in Education and Training until 2020 (adopted in 2009) identified ‘making lifelong learning a reality’ as one of its four...
One of C. LEVI-STRAUSS’s theses shows how primitive thought (– typology, the inexorably incomplete reflection of an impossible inventory) construction, so as to avoid the risk of an unlikely classification or erroneous category or a different category, it must nevertheless be submitted to a rational undeniably founded. Indeed, the comparative reasoning on which the operations of classification are learned. Executive summary of Final Report Source: 2010 update of the European Inventory on Validation of Non-formal and Informal Learning. The countries can be categorised according to their level of development, as being either at a high, medium-high, medium-low or low level. This categorisation by ‘level of development’ is useful to obtain a view of the state of the art in VRPL. However, it is important to note that the categorisation provides only an overall assessment in a dynamic consideration. In fact, the situation is often complex and multi-faceted at the national level, as different degrees of progress and development are in operation in different sectors (e.g. vocational education/ training, higher education, the private sector, etc.) within the same country. In contrast, some countries may not have a clear national legal or policy framework but have bottom-up initiatives with very high levels of take-up. The focus of this classification is on relative, rather than absolute, levels of performance.

<table>
<thead>
<tr>
<th>Category</th>
<th>High</th>
<th>Medium-high</th>
<th>Medium-low</th>
<th>Low</th>
</tr>
</thead>
<tbody>
<tr>
<td>Countries</td>
<td>Finland, France, Netherlands, Norway, Portugal</td>
<td>Denmark, Germany, Romania, Spain, Sweden, UK</td>
<td>Austria, Belgium, (Flanders), Belgium, (Wallonia), Czech Republic, Estonia, Iceland, Italy, Ireland, Liechtenstein, Lithuania, Slovakia, Slovenia</td>
<td>Bulgaria, Croatia, Cyprus, Greece, Hungary, Latvia, Malta, Poland, Turkey</td>
</tr>
</tbody>
</table>

Source: 2010 update of the European Inventory on Validation of Non-formal and Informal Learning. Executive summary of Final Report

Indeed, the comparative reasoning on which the operations of classification are based is a pragmatic way of thinking. It so happens that, if human thought is undeniably founded – most often and implicitly – between elements of a same category or a different category, it must nevertheless be submitted to a rational construction, so as to avoid the risk of an unlikely classification or erroneous typology, the inexorably incomplete reflection of an impossible inventory.

In functionalist research, « the country or the nations are but local contexts in which the studied phenomena are inserted. The national context is, therefore, in this case, totally heterogeneous in relationship with these phenomena »; consequently, “the relationship between micro and macro levels is not really constructed and problematized » 22. As it is, the analysis of the implementation of the device would require to be solicited as much by individuals on a local level as by institutions on a global level. Hence, how would these solicitations manifest themselves in different periods and areas in Europe?

In the culturalist approaches, « the national reference (…) is conceptualized in terms of national culture. The phenomena under study are then supposed to be strongly influenced by this culture, to the point of provoking strong discontinuities when those phenomena are compared from one country to another, because of their cultural specificity or identity » 21. The universalist and culturalist approaches, which pay little attention to the differences that have been noticed, respectively present the following defect: «applying a pre-established pattern, in the first case; postulating the existence of national specificities of an institutional, cultural or historical nature, in the second case ».

Therefore, the societal approach aims at going beyond those pitfalls by considering universalist traits as much as particularisms, at the same time highlighting the reference to « questions of representations, meaning and values rooted in the personal history » of the individuals registering in a process of recognition and validation of acquired experience, and the reference to the institutions directly or indirectly involved in the implementation of the devices. In that sense, this echoes B. PROT’s approach, i.e. showing how the interaction between the collective and the individual element is not only present in the work described by the VRPL candidate, but also how central this interaction is to the VRPL process.

Countries with a high degree of development

This category was defined as countries which have given developments to validation policies to the implementation of validation practices. They have established practices for validation, encompassing all or most sectors of learning, and which already show a significant level of take-up. They also have a

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17. One of C. LEVI-STRAUSS’s theses shows how primitive thought (« la pensée sauvage ») is based on a coherent vision of the world, contrary to the reductive presentations that were formulated during the first halting steps of anthropology.


to apply for a place on a HE course through exemption of the qualification
The process, termed ‘Validation des Acquis Professionnels 85’
universities and other types of HE institutions, such as schools for engineers).
taken into consideration in determining access to HE (concerning only
training. In 1985 a decree was adopted to allow professional experience to be
curriculum for a formal qualification from an HE institution, or a part of this
is possible to grant exemption from a pre-requisite to enter a formal training
(positionnement or evaluation des compétences et aptitudes professionnelles), it
for higher education, recognition of professional experience has
also been used for a long time (in fact it dates back to 1934) to allow access to
individuals who do not meet formal requirement criteria and, in some cases,
acquisition of a diploma. A new practice emerged in the 1970s, when a new
pedagogical approach moved towards the modularisation of training, to
recognise the learning outcomes of workers (obtained through work experience
or short in-company training courses) as an entry route to Higher Education
(HE). Through an evaluation of professional skills and competences
(positionnement ou évaluation des compétences et aptitudes professionnelles), it is
to grant exemption from a pre-requisite to enter a formal training
curriculum for a formal qualification from an HE institution, or a part of this
training. In 1985 a decree was adopted to allow professional experience to be
taken into consideration in determining access to HE (concerning only
universities and other types of HE institutions, such as schools for engineers).
The process, termed ‘Validation des Acquis Professionnels 85’ enables all
person aged 20 or over who ended their initial studies at least two years before
to apply for a place on a HE course through exemption of the qualification
normally required.

Countries with a medium-high degree of development
This category would include either countries where there is a national system, or
a framework of systems, for validation but take-up remains relatively low, or
countries where there is a particularly well-established system of validation in a
certain sector with a high level of take-up, but not a national framework in place.

In Spain, there are some opportunities for validation in relation to Higher
Education (HE) and also professional competences (up to a certain level). Some
Autonomous Communities (Comunidades Autónomas – CCAAs) have also
established procedures for validation. In Higher Education, since the 1970s
individuals aged over 25 without upper secondary education have been entitled
to access Higher Education upon satisfactory performance in ‘over-25s’ Higher
Education access exams – although without receiving a secondary school
qualification through this process. Later, from the early 2000s new measures
were put in place at national level in order to recognise competences acquired
through non-formal and informal learning. A new decree to regulate validation
procedures in Higher Education has been drafted and will be finalised by the end
of 2010.

In 2009, the Royal Decree on the recognition of professional competences
acquired through work experience established the procedures and requirements
for the validation of professional competences acquired through work
experience and non-formal learning processes. The Decree opened up a structure
for validation of professional competences, for modules of formal Vocational
Education Training (VET) or full qualifications at levels 1 to 5, according to the
criteria specified in the National Catalogue of Professional Qualifications. The
decree is restricted to only some levels of competence and the calls for
examination will only apply to certain economic sectors each year. The first joint
call for validation of professional competences will be carried out in 2011 and
will only cover some competences. It is planned that other competences will be
included in the calls launched in the following years. The first round of
validation of professional competences under the new regulatory framework at
national level will be carried out in 2011, covering modules included within the
Catalogue on children’s education and medical care sectors. It is expected that 8,000 people
will take part in the process in 201124.

Countries with a medium-low degree of development
Countries with a medium-low degree of development are likely to have
established validation systems in one or more sectors, but not amounting to an
overall framework for all types of learning.

23 The 1984 January 26 Law and the 1985 August 23 Decree mentioned exactly: “validation des études, experiencies professionnelles ou acquis personnels”: validation of studies, work experiences or personal outcomes.

24 The legal framework states the CCAAs must introduce the process on validation on their territory by 25th August 2010.
Recently in Italy, some of the most recent Government initiatives towards the introduction of a validation system appear: The White Paper of the Ministry of Labour, published in 2009. The White Paper assigned specific importance to the needs of individuals.

In relation to validation, the Paper aimed at giving value to “workplace learning” and informal learning and is an important statement about the need to build and implement a national system of validation of competences²⁶. The document “Italia 2020”, an action plan for the employability of young people through the integration of jobs and learning, signed by the Minister of Labour and Social Policies and the Minister of Education, Universities and Research. The document “Italia 2020 - Piano di azione per l’occupabilità dei giovani attraverso l’integrazione tra apprendimento e lavoro” (Italy 2020 - Action plan for the employability of young people through the integration of jobs and learning) was signed on 2009. The Action Plan identifies strategic policies for the coming years in the field of VET and identifies an urgent need to develop suitable approaches and instruments to: Ensure a match between workers knowledge and labour market needs, with priority focusing on “assessment and validation” of learning and the updating of the training processes; streamlining the governance of training systems, with specific regard to the involvement of social partners; improving the quality of educational activities, by introducing new systems and approaches to assure quality of accreditation and certification procedures.

Countries with a low degree of development
This category was previously defined as encompassing countries in which “as yet there is little in terms of policy or practice which actually facilitates the validation of non-formal and informal learning”. This category now includes countries which may be in the process of developing, or approving legislation or policy relating to validation, or tools which might support the introduction of a process of validation such as occupational profiles, as well as those countries where very little activity, if any at all, is taking place.

Types of approach or system of the Validation and Recognition of Prior Learning
On the 2010, countries can be divided into two main categories those with a centrally designed and managed system of validation on the one hand and those with local project based initiatives on the other. These two main categories encompass several different approaches. In countries with a centrally regulated


introduced tools for the VRPL, making it an individual right (e.g. Emilia Romagna and Toscana), linking it to the recognition of credits for access to formal training or education (Valle D’Aosta, Lombardy, Marche, Umbria) or using it to promote the employability of jobseekers (Veneto and Lombardy). In terms of Higher Education (HE), the Ministerial Decree No. 270/2004 affirmed the possibility for the Universities to recognise "the knowledge and professional skills certified according to the existing legislation as well as the other knowledge and skills gained in training courses at a post-secondary level in which the university contributed in design and delivery". "The University for Lifelong Learning" guidelines developed by a working group, organized by the Ministry of Universities and Research in 2007²⁷ state that the university system must be an integrated and constantly monitored system in which the recognition of learning should be possible, regardless of how and where the learning took place. In the same document Universities are invited to visit the Centres for Lifelong Learning (CAP) which are academic centres operating at regional and national level also in partnerships with enterprises and public administrations.

One of the main purposes of CAP is to help individuals to validate non-formal learning (as credits toward the university programmes the individual is interested in), and to personalise training pathways according to the previous experience acquired in other contexts and to facilitate the access of adult learners and / or employees to validation. Furthermore, numerous local “micro-experiences” have been implemented throughout Italy in different Regions and in a variety of sectors.

On 2010, an agreement between the Ministry of Labour, the Regions and Social Partners was signed, concerning training and general policies to be jointly implemented through the year. The agreement envisages the national qualifications system as the fundamental basis for efficiency and transferability of the outcomes of non-formal and informal learning. Validation is mentioned as an important aspect to develop in relation to competitiveness and lifelong learning.

It seems that those countries which have a local approach tend to fall within the lower level of development categories and although there is a mix in terms of the level of development among those countries with a centralised approach, it is interesting to note that all of the countries in the ‘high level of development’ category have a relatively centralised approach in one or more sectors of learning.

Data on flows of beneficiaries
In 2009, near 75 000 files they were judged permissible by the set of the Ministries sender of Certifications by means of VAE and a jury examine around 58 000. Around 32,000 candidates they obtained a certification by VAE that is 13% than in 2008 more. After a slight reduction in 2008, the number of certificates by the Validation of the Acquired Experience returns to establish with a tendency to the rise to the work from 2003: the number of candidates certificates had progressed much during the first years of ascent in load of the device (+ 65% between 2003 and 2004, + 28% between 2004 and 2005) soon more moderately (+ 15% between 2005 and 2006, + 16% between 2006 and 2007). In 2009, the number of candidates judged permissible for the obtaining of titles of the Ministry of national Education progresses a 13%.

In 2010, nearly 75 000 files have been considered admissible by the whole of the ministries delivering certifications through the VAE, and about 53 000 candidates have been heard by a jury. These numbers have varied very little since 2007, after a big increase between 2005 and 2007. In 2010, about 30 000 candidates were awarded a certification by the VAE, i.e. 7 % less than in 2009. The yearly number of certified students had largely increased between 2003 and 2005, before they became stable at about 30 000. Since 2002, which is the date the device was implemented, the number of certified candidates has risen to practically 200 000.

Table 1: Flows of beneficiaries, in France, for the period 2004-2010 (Dna=Data not available)

<table>
<thead>
<tr>
<th>Total number of candidate applications</th>
<th>Total number of candidates who were assessed</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006 2007 2008 2009 2010</td>
<td>2006 2007 2008 2009 2010</td>
</tr>
<tr>
<td>Ministry of Higher Educ. and Research</td>
<td>Dna Dna 6909 6764 6 656 3935 4529 4309 4476 4 282</td>
</tr>
<tr>
<td>Ministry of Agriculture</td>
<td>839 799 961 1043 927 365 371 446 522 511</td>
</tr>
<tr>
<td>Ministry of Social Affairs and Health</td>
<td>16 235 29 720 22065 19675 17 854 16111 13899 19504 17 741</td>
</tr>
<tr>
<td>Ministry of Employment</td>
<td>8 855 10 178 10659 10863 8 948 9360 8983 8632 8743 7 847</td>
</tr>
<tr>
<td>Ministry of Youth and Sports</td>
<td>2 503 Dna Dna Dna 1407 Dna Dna Dna</td>
</tr>
<tr>
<td>Ministry of Army</td>
<td>151 155 413 591 496 86 78 210 331 456</td>
</tr>
<tr>
<td>Ministry of Culture</td>
<td>1 193 1 201 1221 187 26 1108 1125 106</td>
</tr>
<tr>
<td>Ministry of Maritime Affairs</td>
<td>Dna Dna Dna 82 122 74 64 68 82 73</td>
</tr>
<tr>
<td>Total of ministries awarding qualifications</td>
<td>Between 56 000 and 59 000 Between 75 000 and 80 000 Between 72 000 and 75 000 Between 72 000 and 75 000 Between 70 000 and 75 000 47 937 approx. 55 000 approx. 53 000 approx. 58 000 approx. 53 000</td>
</tr>
</tbody>
</table>

Source: DARES (NB These statistics only take into account qualifications officially recognised by the State. For the time being, there are no statistics for other certificates (for instance those awarded by chambers of industry or of trade)
As mentioned above, only recently a process for the validation of professional competences has been put in place at national level in Spain. The Roadmap anticipates that 8,000 individuals will apply to the first call for validation (which will take place in 2011), 25,000 to the second call and 50,000 to the third one. However, take-up of some of the validation initiatives currently available is relatively high. For example, between 2004 and 2005 the number of people who made use of the registered university entrance examinations for over 25s was 19,853 and the number of students who accessed VET via entrance examinations at intermediate level was 12,267, while at higher level the number was 7,796.

At Higher Education level the Ministry of Education is currently working on a new regulation on validation. The new regulation will establish the procedures to validate non-formal and informal learning up to 15% of an undergraduate degree or master’s degree.

Figure 1 shows the take-up of validation for educational purposes in Spain from 2002 to 2005 and that take-up is highest in relation to validation for access to university education and VET at the secondary level. Take-up for access to higher VET or to obtain a full secondary VET diploma is much lower. Take up levels have increased over the period analysed, although it is still moderate to marginal.

Figure 1: Validation of non-formal and informal learning in Spain
Source: Souto-Otero, M. (2009) Making-up people’s minds: How can VET be made more attractive and relevant to economic needs? Peer Review on “Towards a new vocational training system more adjusted to the new competencies and skills requirements of the labour market”.

Conclusion

The potential benefits of RPL are gaining greater visibility within France, Spain and less in Italy. If all descriptive and analytical elements which appear in this contribution make it possible to pose a first reflection, there remains questions which cannot be occulted and which will weigh on the development of the system of VRPL so much on the level of its institutionalization only of its territorial establishment.

Implementing direct paths in order to obtain formal qualifications or providing “facilitating measures” for an access to various trainings, and thus, avoiding the repetitions and failings of the educational system, are an essential reason for the validation of the RPL. Validation can prove useful in meeting the needs for the various economic sectors, such as the shortages of qualifications or the observance of the regulations relating to professional qualifications. More and more actors of the private sector (social partners and private companies) acknowledge the advantages of validation. More and more actors of the private sector (social partners and private companies) acknowledge the advantages of validation. Validation is acknowledged in certain countries as a supporting tool for such disadvantaged groups as refugees, unemployed people, and elderly workers. Validation implies a reference to a standard, as recognition and validation form a process “aiming at identifying, formalizing and socially recognizing the knowledge and skills acquired in action; in other words, they concern the clarification of the conditions of knowledge production and the process allowing awareness and formalization with the purpose of social validation”. The nature of those standards is crucial and will largely determine whether the results of validation are reliable or not. If a standard is too local, it can have a negative impact on transferability. If it is too general and lacks flexibility, it can prevent validation from precisely defining the essence of individual learning experience. In order to encourage validation, standards must, first and foremost, be (re)defined and described as acquired learning or skills; and even if, to a certain extent, such is already the case, substantial work must still be accomplished, especially on the level of mainstream and higher education. It can sometimes be noticed that validation measures meet with skepticism, which reflects a representation pervaded with the fear of seeing the global level of validation quality decrease in the case of an opening to non formal and informal learning.

30 KOK W., 2003; Conseil de l’Union européenne, 2004b; Commission européenne, 2007a
Older Adult Education Policies in Taiwan and in China: A Comparative Study

While in some respects the nature of older adult education in Chinese-speaking community seems unique. It is noteworthy that although both Chinese in the mainland China and Taiwan share the same language and the same culture in certain aspects, the different political regimes make the educational development different, for example, older adult education. This is our initiative to conduct this study from the comparative perspective of older adult education in Taiwan and in China.

Taiwan is predicted to formally become an aging society in 2017, with the number of people aged 65 years and older accounting for 14% of the population. It is taking only 24 years for Taiwan to turn into an aging society; the transformation speed was really fast compare to other advanced Western countries. Due to the inevitable “aging society,” the Taiwan government is currently paying more attention to the welfare of senior citizens, and the Ministry of Education published “Older Adult Education White Paper” in 2006. This paper points out that it is very significant to come out with various educational senior curriculum and programs. In this context, The Ministry of Education has been establishing local senior learning centers in different counties and cities of Taiwan, there were 225 different active aging learning centers (AALCs) all over the country by the end of May, 2012. To create a better living environment for the increasing number of seniors, the Ministry of Education has already made a blueprint for the future development of the aging society by establishing the Centers.

In China, more than 30% of the population is expected to be age 60 or older in 2050. To face the challenging task of the increasing aging population, the government of China set up a Pensioner Affairs Bureau to look after the interests of the elderly. In this context, varieties of universities for the aged (U-3As) have been established, supported and funded by government in 1980s.

We feel that promotion of older adult learning can be one of the essential strategies to tackle the challenges posed by an ageing population in Taiwan and in China. This paper begins by identifying major similarities and differences...
between Taiwan and China in the elder adult education system in the macro-framework. We hope that lessons could be learned in promoting older adult education by analyzing various experiences in the two countries.

Keywords: older adult education, Active Aging Learning Centers, U-3As

Taiwan and Mainland China, having the same language and ethnicity, are facing the similar problem in the aging society. Nevertheless, the presentation of older adult education is distinct because of different forms of government. This study first describes the development of older adult education in the macro perspective and further analyzes comparisons between the two countries.

I. Evolution of older adult education policies in Taiwan and Mainland China

Taiwan is aging rapidly. The number of people aged 65 and over increase from 7% in 1993 to 14% in 2017. It is taking just an estimated 24 years for Taiwan to turn from graying to aging, compared to 50 to 100 years in other advanced Western countries. Since Taiwan government noticed the important issue of population aging, older adult education in Taiwan has been developed for thirty years. Regarding the older adult education activities, Young Women’s Christian Association first established Green Vine Club in 1978, aiming to develop the virtue of respecting the elderly. As the first policy concerning the elderly, Senior Citizens Welfare Act formulated by Taiwan government in 1980, was further revised and developed in 2007. The policies are based on various services to ensure the benefits of the elders, such as emphasizing the welfare benefit, pensions, and residence of the elders. In 1980’s, the governmental organizations and civil associations collaboratively established Evergreen Senior Citizens Center, which was considered as the beginning of the organizational older adult education in Taiwan. However, the learning contents in older adult education mostly focused on the interest and expressive needs of elders, but less on knowledgeable and cognitive courses.

In 1990’s, Ministry of Education formulated the older adult education protocols of Education Plans for Elders and committed the education bureaus of municipality governments to conducting the policies. In 2006, Ministry of Education published “Older Adult Education White Paper” emphasizing the standard of older adult education. In order to implement the policy of older adult education White Paper, in 2008 Ministry of Education committed Educational Gerontology Center of Chung-Cheng University to integrating local public and private sectors to set up active aging learning centers (AALCs) within three years. By the end of May 2012, 225 active aging learning centers were established. Generally speaking, in the evolution of older adult education policies, there were various sectors involving in older adult learning activities in Taiwan, including social administration, educational administration, higher education institutions, civil organizations, and religious groups.

Before 1990, the older adult education policies in Taiwan focused on enriching the life of the elderly and providing welfare services, i.e., the policies ensured elder’s social welfare and increased elders’ life satisfaction. After 1990, the government gradually noticed the importance of older adult learning, and the elderly’s learning right was emphasized. In the beginning of this century, Ministry of Education of Taiwan formulating older adult education white paper, thus participating in learning plays an important role to achieve the vision of successful aging life for the elderly. With such a policy, 225 active aging learning centers were established in schools, universities, communities, etc, to provide the elderly convenient and secure learning environments. Different from the past older adult education institutions, the learning contents in active aging learning centers focused on the necessary knowledge for the elders, covering the curriculum of knowledge, interests, expressions, and contributions.

Mainland China became an aging society in 1999 and is now the country with the most aging population of the world, about 1/5 of the international elderly population. The aging population in Mainland China was growing rapidly which only took a short time for the elderly population above 65-year-old to increase from 7% to 14%. In other words, it merely took 27 years to change from the aging society to the aged society (Chen, 2006). Aging population became a critical issue in Mainland China, but the regulations for older adult education was not formulated until 1996. A series of policies therefore have been formulated by the governmental sectors to show the emphasis of the elderly. For example, Ministry of Education of Mainland China promulgated Enhancing Education in the 21st Century in 1999, containing community education and lifelong education systems in the elderly education; establishing and completing the social system in 2000. Besides, the Central Committee of the Chinese Communist Party and General Office of the State Council further proclaimed Decisions of Reinforcing the Elderly Work in the same year, and all levels of government implement the policies of the elderly education. These policies aims to protect the right of learning, to enrich the life and to development the service for the elderly (Yang & Chen, 2007).

In regard to the older adult education institutions in Mainland China, third age universities are commonly known. In 1983, the first third age university was established in Shandong, and this institution aims to offer the elderly the opportunities of self-development and self-service. By the end of 2008, there were about forty thousand third age universities with more than five million elderly participating in the learning activities in Mainland China. In 1990, Open Universities for the elderly were founded in Beijing and Shanghai, thus the elderly could flexibly arrange the time to receive education and conduct their learning activities through televisions, broadcast media (Chen, 2006). Other
friendly elders’ activities were held in communities of many cities, which demonstrated the widest form of elder education.

Regarding the evolution of older adult education policies in Mainland China, the policy in 1990 proposed the right of continuing learning for the elders. On the other hand, the number of older adult education institutions is increasing in Mainland China, from non-formal educational institutions to informal learning in communities. Nonetheless, they are promoted by the government from policies to practice.

Reviewing the evolution of older adult education policies in Taiwan, the following problems appear in the promotion process. 1. The promotion systems are diversified but lack of an integrated mechanism that may cause waste in resources (Minister of Education, 2006). 2. Ministry of the Interior has promoted older adult education for years while the subsidies for older adult education have been established as norm. It is just the beginning for Ministry of Education to provide learning opportunities for the elderly. When the subsidies are not definitely guaranteed by the Ministry of Education, the policies could hardly be permanently implemented (Wei & Huang, 2011). 3. To attain the goals of active aging, the related learning contents should be covered in the older adult education activities. Nevertheless, the past learning activities were simply regarded as the welfare for the elderly that the learning contents focus on leisure and entertainment activities. Consequently, the cognition- and knowledge-oriented elder learners are not attracted.

In the developmental process of older adult education in Mainland China, the following problems are discovered. 1. The policies do not appear definite orientation on the development of older adult education. 2. The relevant policies pay more attention to the development of tertiary universities, but not to the older adult education in communities (Wang & Tan, 2011). 3. The older adult educational activities are mainly led by government, so the connections with civil resources are limited.

II. Comparisons of older adult education policies between Taiwan and Mainland China

According to the evolution of older adult education policies and contents in Taiwan and Mainland China, the following comparisons are analyzed.

(I) Similarities

1. Both the older adult education policies in Taiwan and Mainland China aim to assist the elderly to have a better life quality and to increase the life satisfaction.
2. The regulations for curriculum framework and teachers’ qualifications have not been indicated in the policies. In spite that older adult education in Taiwan and Mainland China has been greatly promoted in the past two decades, there is no definite regulation for the important elements in the older adult education activities, such as learning contents for the elderly and the qualifications of the teachers.

3. Participants in older adult education prefer learning in institutional settings. Older adult education institutions are the major learning places for the elderly in Taiwan and Mainland China. The reason may be that Chinese people commonly consider the learning activities being held in specific educational institutions.

(II) Differences

1. The leaders of older adult education institutions are different. In Taiwan, older adult education was first conducted by civil organizations and then supported by social affair bureau of the government. There are various sectors collaboratively promote and implement the policies nowadays. On the other hand, the government leads and regulates the older adult education activities and policies in Mainland China. Such differences lie on the distinct political regimes.

2. The policy perspectives in Taiwan have been changed from welfare into empowerment of the elderly, while older adult education is still regarded as the welfare of the elderly in Mainland China. Such differences might be the policy-makers’ consideration. According to the needs of the elderly in Mainland China, the welfare is started, and then the learning and empowerment are gradually taken into account.

3. The older adult education policies of Taiwan in this century attempts to achieved the goal of successful aging, while those policies in Mainland China are still proceeding in the framework of lifelong learning. The objectives of educational policies in Taiwan are definite and more concrete, while the objectives of the elderly participating in lifelong learning are not interpreted in Mainland China. The ideals of theoretical reasearch on older adult education in Mainland China should be integrated into the promotion of practice so as to make the objectices more explicit.

4. In recent years, researchers in Taiwan have actively participated in both the policy formulation and the promotion of older adult education practice so that 225 active aging learning centers have been established. The innovative curriculum and learning activities are designed based on the ideas of theoretical foundation, and they have been realised in these centers. The reason is that there are academic sectors of older adult education in Taiwan, and the researchers are willing to contribute the specialties to this domain. Consequently, the development of older adult education in Taiwan can better meet the needs of the citizens.
III. Reflection on comparative education method

Comparative analysis is the tool to explain various social phenomenons between two different countries (Green, 2002). One of the most significant contributions of comparative analysis was to make clear of the political aspects toward elder education in two different countries (Broadfoot, 2002). Since there are identical language, history, and similar cultural backgrounds between the two nations, it is considerably easier to comprehend the formulation of older adult education policies. Nevertheless, comparative research in this study is limited because of different political systems. Particularly, the government of Mainland China guides from the policy formulation to the implementation of older adult education activities, so that the relative data, such as curricula and number of participants, are unaccessible. This is the difficulty in proceeding the study. We suggest that further research can compare specific older adult education organizations in the micro perspective so as to better understand the context, the development, and the barriers of older adult education between two nations.

References

& Thomas, 2003), its comparative development, approaches, organisation and practices have not been explored for some time. In this paper we examine and contrast recent developments in the national and institutional approaches to, provision of, and support for UCE in Canada and the UK. We compare the current state and context of UCE within and across each country, explore what internal and external factors are influencing its development, and discuss the institutional and organisational responses to those influences.

Canada

Reporting on Canadian UCE is complex and confounded by geographic and cultural factors. The country is vast, the second largest in the world. Most of its 33 million population is concentrated in metropolitan areas along the southern border with the USA although a sizeable proportion still live in northern areas. The provision of education and other social services in the more remote areas is sporadic and it is often difficult to discern just what services are available where. Also, the country possesses enormous cultural diversity: 20% of the population being foreign-born. Different ethnic and historical backgrounds—Aboriginal, European, Asian, Afro-Caribbean, Middle-Eastern and other immigrant populations—add significantly to the variety of social and cultural values and perspectives (Fenwick, Nesbit & Spencer, 2006).

This geographic and demographic diversity is further complicated by Canada’s political system. Canada is a country with a federal structure, with 10 provinces and 3 territories sharing responsibilities with a national government. As almost all Canadian universities are publicly-funded and a provincial government responsibility, there are effectively 13 distinct systems of, and approaches to, higher education. Each province houses a constellation of universities, university-colleges, community colleges, technical institutes, and other public and private degree-granting institutions and have differing governmental approaches to supporting adult, higher and continuing education. Indeed, with no nationally agreed-upon definition of adult or continuing education, provincial policies, structures, financing and organisation differ widely and so favour school and higher educational systems that continuing education either disappears from the policy screen or is subsumed under the rubric of post-secondary education. Despite this, the federal and most provincial governments continue to adopt laissez-faire attitudes toward UCE and other forms of adult education and show no sense of urgency to create any mechanisms to create more coherence.

Although initially modeled on their British counterparts, Canada’s 80+ universities have now developed to reflect the particular historical, socio-cultural, and economic characteristics of the regions in which they are located. Most attract significant number of adult learners: about 25% of the approximately 1 million undergraduates, and 75% of the 200,000 graduate students are over 25 years old (AUCC, 2011). However, as it is unclear just how many universities offer any form of continuing education and record-keeping in this area is less meticulous, accurate figures for adult learners in continuing education are harder to come by. Nesbit (2012) estimated a figure of about 400,000.

Many Canadian universities profess continuing education or lifelong learning as an institutional goal and they are keen to identify and promote their approach to it (McLean, 2007). University mission statements usually include some statement as, for example:

The University of Toronto wishes to encourage learning as a lifelong activity and is committed to providing to persons in professional practice and to members of the community at large opportunities to study and use its facilities [and] helping other institutions, professional associations and learned societies through the provision of facilities and expertise. (www.utoronto.ca/about-uoft/mission-and-purpose.htm)

What’s noticeable about such statements is their expression of concern for enhancing professional practice and providing service to the community: a commitment that most public universities share, at least rhetorically. Half (48) of Canada’s universities are members of the relevant national professional association: the Canadian Association for University Continuing Education (CAUCE). Most have developed one central unit or division specifically dedicated to organising and administering the overall provision of continuing education. These units tend to be referred to as Continuing Education or Continuing Studies although their title may also include such terms as university extension, extended or lifelong learning, continuing professional education, l’éducation permanente, distance education, distributed or open learning, community outreach and engagement or continuing higher education.

Such units have a long history (Conrad, 2005; McLean & Carter, in press) and encompass a broad range of activities that encourage and provide for adult and lifelong learners to study for professional or personal advancement. They include both credit and non-credit options and can take the form of conventional courses and seminars, workshops, public lectures, conferences and moderated discussions, home-study, distance or online courses, hands-on projects, or customised training. In some universities, professional schools—like business, medicine or education—have preferred to develop their own continuing education programs which offer short-term professional development and customized training courses. The most common courses involve English (or French) as a Second Language, business and management, courses in fine arts, humanities, computers and information technology and courses for seniors (55+).

Although UCE is subtly different at each university, what essentially differentiates it from more conventional university-level provision is that it is usually part-time, broadly available to most sectors of society, highly-flexible
and responsive to learner demand, requires few if any prior credentials, is generally multi- and trans-disciplinary, operates on an entrepreneurial and cost-recovery basis and is specifically organised upon an understanding of and respect for adult learners' unique needs and challenges. There is no specific format or length for a continuing education program: some may just take a day or weekend, while others can span weeks or even months. In addition, UCE programs and courses need not be located on a university campus but can be organised in a variety of alternative venues and communities. In fact, several major universities in Canada have developed “downtown” operations and/or satellite campuses (Booth et al., 2008). Here, universities with their main campuses located in suburban or greenfield sites have recognised that not everyone is easily able, or wishes, to take advantage of on-campus services. They then develop other facilities and programs better suited and closer to the population of working and adult learners. Perhaps unsurprisingly, this movement has prompted some universities to re-examine their core activities and has encouraged further discussion about the role of higher education in civic engagement and community outreach, challenging social exclusion, and advancing citizenship, participation and social justice. This has caught the attention of such international organisations as UNESCO which has recently established a chair in Community-Based Research and Social Responsibility of Higher Education and named noted Canadian adult educator Budd Hall as one of its two co-chairs.

As might be expected, the form and extent of UCE provision varies considerably among the range of Canadian universities. A recent CAUCE institutional study (Percival & Potter, 2007) reported that most institutions offered both degree and non-credit courses with at least some being offered in off-campus or distance education formats. If one assumes that approximately 400,000 adult learners each year engage in some form of UCE activity and the total number of students at Canadian universities is about 1,000,000, it is clear that UCE is, overall, an important part of university activity. Despite these impressive figures however, most universities still appear to regard UCE rather passively as an essentially remedial activity, peripheral to the main goal of educating younger students and the already advantaged. Moreover most UCE programs appear to focus more on enhancing employment and career opportunities than on civic concerns; an issue that causes periodic concern to more socially-connected (or naïve) adult educators (Haughey, 2006; Nesbit, 2008).

Universities’ general lack of interest and enthusiasm for UCE is reflected in various Canadian governmental approaches. For some years, governments have been encouraging post-secondary educational institutions to develop lifelong learning and several government reports have detailed the skills and learning challenges that Canada faces (Canadian Council on Learning, 2010; Human Resources Development Canada, 2002). These reports acknowledge the broad needs of adult learners and link those needs to a concern for a continuous system of learning development to support Canada's economic growth and sustainable quality of life and enhance community involvement and social cohesion. They call for educational institutions to broaden their provision to include educational opportunities for an ever more diverse group of learners. However despite their rhetoric, governments provide few financial or other incentives to back up their policy imperatives and UCE receives no separate or specially-targetted funding. Perhaps most egregiously, no overview of public spending on Canadian adult and continuing education exists and accurate figures on programs, participation and financial issues remain hard to come by.

Given their proximity to the issues, one might expect UCE units to have systematically explored such concerns. However, it’s unclear to what extent, if at all, this is happening. The most recent analytic studies on Canadian UCE (Brooke & Waldron, 1994; Morris & Potter, 1996), are now quite out of date and, although there have been a number of smaller studies since then, they have tended to focus on individual programs and be “applied, small-scale, short in duration, isolated, non-systematic and noncumulative” (Percival & Kops, 1999, p. 46). Of course, there is a general dearth of research into continuing education (Coffield, 1999; Duke, 1996) but this seems especially true in Canada. Most Canadian units have a more practical and programmatic focus rather than an academic orientation and few members of staff enjoy faculty status. Consequently, it has proved difficult to allot time and other resources to research and, despite the pressing need, it is not considered a major activity. In addition, other concerns have predominated: UCE units are under increasing pressure to expand and broaden their intakes, transform their curricula and pedagogies and, not only cover their operational costs but also provide a source of revenue to their parent university (Nesbit, Dunlop & Gibson, 2007; Slowey & Schuetze, 2012).

**England**

For most of the 20th century, reporting on university continuing education in England was relatively straightforward. The Workers’ Educational Association (WEA), founded in 1903, was based around a critique of the University Extension movement (“the average University Extension lecturer is decidedly middle-class in his outlook” (J.M. Mactavish, quoted in Mansbridge 1913, p. 14)). The WEA’s academic apostles had youth, energy, intelligence and connections on their side (the WEA’s key supporters at Oxford included William Temple, the son of an archbishop of Canterbury, elevated to the same position in 1942, Richard Livingstone, vice-chancellor of Oxford from 1944, and Alfred Zimmerm, pipped at the post as first secretary general of UNESCO by Julian Huxley in 1946). Lending weight to their cause was the rise of organized labour (of which the WEA was in some respects part), and in due course the Great War – toward the end of the which the Ministry of Reconstruction’s Adult Education
Committee recommended that universities should establish ‘extra-mural’ departments. It was largely the WEA connection which led central government to fund adult education in England and Wales (from 1909).

The first university to set up an extra-mural department was Nottingham in 1920 (by 1930, Exeter, Oxford, Cambridge, Hull, Southampton and Leicester had followed suit (Raybould 1951 pp. 126-127)). Their initial focus was the ‘tutorial class’, meeting for two hours weekly over three years, undertaking (uncertificated) work of ‘university standard’. Curriculum planning involved close collaboration with the WEA, through ‘joint committees’. Grant-aid supported ‘liberal’ (i.e., non-vocational) education and the employment of full-time and part-time tutors. The volume and character of extra-mural provision changed somewhat after 1945, but its defining features remained: the ‘liberal’ curriculum; association with the WEA (and a growing range of other community stakeholders); and grant-aid, allowing departments relative autonomy in their universities. Typically, full-time ‘staff tutors’ would both teach ‘tutorial’ classes weekly through the autumn and winter for two terms, and organise – in association with the WEA and others – a programme of classes in their subject taught by a larger band of part-time tutors.

For half a century, this pattern was firmly entrenched. However, as a senior adult education scholar lamented, extra-mural (literally, ‘outside the walls’) could also mean ‘out of mind’:

Fifty years ago dons and senates gave time and energy to adult education because they saw it as a means of correcting or mitigating an injustice: the denial of educational opportunity to intelligent “working men and women”. Such feelings do not survive in a meritocracy; they are replaced by a conviction (which though unwarranted is extremely comfortable) that justice has now been done and that secondary and higher education is now freely available to all who can profit by it. Those left behind are therefore seen not as the dispossessed but as the incompetent, and the sense of obligation which impelled the Universities into extension and extra-mural activities between 1870 and 1945 is weakened or destroyed. (Wiltshire 1976, pp. 103-4.)

This observation was to prove prescient. The 1970s began promisingly, with the Russell Committee advocating that universities adult education work ‘should be brought visibly and directly into participation in the public system of education, with a focus on liberal studies, “balancing” studies of an academic character brought visibly and directly into participation in the public system of education’, role education, industrial education, training and ‘development or pioneer work’ (DES 1973, pp. xii-xiv, 72-73). Soon, however, the decade descended into economic crisis and ‘cuts’; by the 1980s ‘value for money’ had become a mantra in the public sector, ‘liberal’ views of the aims of education were at a discount across the political spectrum, and ‘neoliberalism’ was beginning to sprout its poisonous fruit. In these circumstances, extra-mural (or, as it was not commonly termed, ‘continuing’) education in universities was subject to a series of ill-considered, short-term and deeply damaging initiatives. Its funding was ‘mainstreamed’ under the higher education funding councils (rather than being provided separately by the Ministry of Education, as it had been since 1909). Quite quickly the curriculum followed: courses had to lead not just to qualifications, but to form part of standard undergraduate degrees. The final straw, was the need to meet the needs of successive ‘Research Assessment Exercises’: extra-mural (or CE) departments, whose academic staff generally spanned a breadth of disciplines thinly, found themselves unable to meet criteria of research ‘critical mass’; efforts to overcome this by focusing on continuing education as a field of study proved generally vain.

In the circumstances, UCE departments withered on the vine. Most closed over – roughly – the decade around the millennium. A few survived, by dint of tireless and gifted departmental leadership (e.g., Sheffield, Leicester), positional advantages (e.g., Cambridge), or a combination of these (e.g., Oxford). But most did not: the great names of the English ‘great tradition’ (Nottingham, Leeds, Newcastle, Birmingham, Bristol, Southampton, Hull, Manchester, Keele, Exeter, London) have all closed, or massively ‘downsized’, as have nearly all the departments created in post-Robbins universities (e.g., Kent, Lancaster, Surrey, Aston). Those few which have survived have been forced to adapt: some are in effect their university centres for management of part-time undergraduate degree teaching (e.g. Liverpool); a few, especially in major cities, have a strong record of development and project work (e.g., Sheffield); some have developed their ‘access’ and ‘outreach’ aspects to become ‘widening participation’ ‘hubs’ of their institution. Nearly all are now designated ‘centres’ or ‘units’, rather than ‘departments’ or ‘schools’. Few employ staff on standard academic contracts, and none now can now be considered principally as providers of a broad curriculum of liberal adult education. Programmes of day and weekend schools have all but disappeared, except at Oxford and Cambridge. Collaboration with the WEA also fell victim to government funding arrangements, which since the 1990s have made a sharp (and deeply ignorant) distinction between ‘further’ and ‘higher’ education.

Reflecting on the experience of these university continuing education over the period 1981-2006, Moseley (2010) comments that ‘to survive, let alone prosper, requires a CE/Lifelong Learning operation to be wholly in step with its university with all that involves’ (p. 52). The difficulty with this prescription is that the price of close alignment between UCE and a university’s mission may be high. Thus, for example, for ‘Russell Group’ and ‘1994 Group’ universities – broadly the universities established before and during the 1960s – international profile is now at a premium. For ‘global’ universities, continuing education has sometimes been over-strongly associated with the ‘local’: for example, thirty years ago Nottingham University had adult education centres in Boston, Derby,
Lincoln, Loughborough, Matlock and Stamford, as well as one in Nottingham city centre (Lawson 1977, p. 10) – all towns and cities within 60 miles of the university’s campus. None remains. However, the university does now boast substantial campuses in China and Malaysia opened over the past decade and offering a range of undergraduate and postgraduate degrees, as well as engaging in research. (There are also now three in Nottingham and one (largely devoted to agriculture-related programmes) in the countryside nearby – though the student body is overwhelmingly full-time and engaged in accredited courses leading to degrees.

The above account has focused on ‘pre-1992’ universities. There is a case to be made (it has certainly become the commonsense within the ‘policy community’) that universities which were polytechnics before 1992 had a stronger ‘local’ mission, and were more attuned to providing part-time courses relevant to their local communities. This was the burden of a critique of university extra-mural education developed by Duke over many years (cf Duke 2008). According to this view, extra-mural departments, protected by ‘ring-fenced’ funding, became intellectually conservative and inward-looking, ceasing to engage both with internal departments and the extension of higher education opportunities which characterized the last decades of the twentieth century; at the same time, they short-changed their students by denying them the kind of recognized qualifications which had value in the labour market. Whilst it remains broadly true that these universities enroll more part-time (and ‘mature’) students than do their ‘pre-1992’ counterparts, the extent to which this should be regarded as ‘continuing education’ is unclear.

Analysis

While most Canadian universities appear to be responding—at least rhetorically—to increased demand for lifelong learning, personal experience indicates that the implementation of appropriate policies and programs face several conceptual and organizational barriers. First, as other studies have shown, capacity building for UCE and lifelong learning means dealing with encompassing, elusive, and contested concepts (Marks, 2002). Universities’ senior administrations do not appear to agree on, or be quite sure of, what UCE actually means let alone how to best organise it. Recent searches for references to “continuing education” on the website of Canada’s national association of universities and colleges yielded few results. Nor does the association detail any institutional approaches to meeting the challenges laid down by the government reports referred to earlier. Second, universities are increasingly competing with one another for both local and international students and to maintain their position they need to find additional sources of revenue to fund the core activities of research and teaching. This strikes at one of the key challenges for UCE. On the one hand it is considered an area of innovation and experimentation enabling the development of new programs and technologies; on the other it is considered to be profit-generating, its income to be returned to the university at large. A third aspect affecting the development of UCE involves university policies and practices that can hinder or discourage adult learning. For example, an earlier study (Nesbit, Dunlop & Gibson, 2007) identified several such barriers: cumbersome enrolment procedures, restrictions on entrance qualifications, inadequate guidance and support systems, a requirement that programs must offer a diploma or certificate, rigid scheduling, the rise of online registration systems, the slow acceptance of alternative prior learning assessment policies, lack of access to a welcoming space appropriate to adult learners’ lives and learning styles, narrow and unimaginative approaches to teaching, course content that ignores learners’ experiences, unsympathetic faculty and staff, and fiscal requirements that limit the freedom to experiment.

UCE in the UK faces many similar problems. Few university senior managers have been clear about the purpose of UCE: though by and large, post-1992 institutions’ leaders – with a more ‘local’ mission – have been somewhat less ‘know-nothing’. CE has ceased to form a strong part of government policy documents about higher education – despite the recent espousal of lifelong learning – while universities have largely disappeared from policy prescriptions as vehicles for lifelong learning more broadly. Many UCE units do extremely valuable work; those with strong and vocal leadership may be seen as a useful complement to the ‘core mission’ of the institution. Nevertheless, mainstreaming – particularly of finance, curriculum and ‘systems’ – has reduced the scope for CE units to exercise autonomy and be innovative.

A comprehensive analysis of the factors that variously enable or limit the development of UCE at Canadian and UK universities suggests that attention be paid not only to conceptual definitions but also to the environments in which such institutions are situated, their organizational and structural contexts, and the cognitive and affective learning interactions they foster. The first factor is the question of the balance between fulfilling provincial expectations for the delivery of higher education (often with limited budgets) and responding to national imperatives. Most universities have to regularly face the questions of who are their students and clients and to whom are they most accountable. Responding to the differing demands of learners, employers, local communities, and the state is a complicated matter, and their responses are compounded by the diverse, complex and changing natures of the Canadian and UK higher education sectors.

Yet, the opportunities to respond proactively to such challenges are often circumscribed by a second factor: financial exigencies and the expectation to constantly do more with less. Clearly, additional resources are required to develop UCE, but there is some uncertainty about who will provide these. In such circumstances, it is not surprising that the pressures to provide for “new”
groups of learners—such as adult and lifelong learners—are not given as much weight as the institutions’ core clientele. Thus, economic imperatives of continuing education tend to be promoted over its citizenship aspects. As Fisher and Rubenson (1998) noted a decade ago, such programs are now evincing a trend toward greater vocationalism or labour-market relevance. The trend continues unabated today.

Since such issues clearly affect institutional capacity to develop lifelong learning by also limiting responsive flexibility, a third factor in the development of lifelong learning involves universities’ distinct administrative, governance, funding, and accountability structures. These affect their overall operations, the educational opportunities they provide, and their capacity to change. Even though institutions of higher education are remarkably stable and resilient organizations, their internal systems and structures change only slowly (Clark, 1998). They are also less comfortable dealing with informal modes of education and tend to marginalize educational activities that fall outside their conventional and traditional systems of delivery (Jones, 2001). This situation is compounded by the often parlous financial state of many universities, brought about by the ambivalence of successive governments toward adequate funding. So, as universities receive no government support for continuing studies activities, the expenses of development in UCE usually have to be met on a cost-recovery basis by increasing student fees.

In other words, lifelong learning has yet to change much of universities’ organizational architecture. However, as with other institutions of higher education, universities are more than ever permeated by the forces that surround them and may need to modify their structures if they wish to ensure lifelong learning means more than providing a range of adult education courses or marketing existing courses to older learners. The institutional implications of lifelong learning highlight the need to widen access to, and improve services for, disadvantaged groups, both through a more cohesive organizational structure and through partnering and collaborating with other like-minded organizations. As Duke (2001) claimed, it is indispensable for a lifelong learning university to play an active part in various communities of learning.

A fourth factor concerns the traditional concept of a university. Although attitudes toward higher education are changing, universities are still too common and regarded as overly formal and traditional and largely designed to provide courses for young people pursuing undergraduate and graduate degrees full-time. Here, university approaches to UCE have implications beyond the merely semantic. How an institution defines continuing education influences its overall approach to, and provision for, adult learners. Also, universities in both countries are relatively autonomous. Although operating in broadly similar economic and social contexts, they can develop their own programmatic and administrative structures as they think fit. Further, both Canada and the UK have little public coordination or nationally agreed-upon approaches to UCE. These elements tend to enhance (at least implicitly) a sense of competition between institutions and discourage cooperative research or joint attempts to deal with shared problems.

References


Introduction

According to EU policy documents, lifelong learning serves the following four purposes: enhancing or maintaining employability, promoting personal development, fostering social cohesion and developing active citizenship (European Commission, 2010). It is generally believed that – nowadays and in contrast to the humanistic approach of the Faure report in the 1970s – labour market requirements such as employability account for more than 80% of all learning activities and lifelong learning is therefore often discussed in terms of ‘human resource development in drag’ (Boshier, 1998; Holford et al., this volume). Whereas this may apply to learning as a whole, we find that the reasons for participation in formal adult learning are far more diverse and going beyond vocational aspects, while national systems differ widely with regard to the scope of courses on offer.

This chapter reports on a survey of adult learners participating in formal adult education. A precise definition and full account of the data collection procedure are found in the annex to this chapter. The survey aimed to collect data from 13,000 adult learners in the 13 European countries/regions involved in the LLL2010 project; due to problems with data collection in one country only 12 countries/regions were included in the comparative analysis. In this chapter we sketch a comparative picture of the profile of these participants in formal adult education. We explore questions such as: Who are these learners? What do national adult education systems offer them? Why do they learn? How responsive are national systems to adults’ learning needs? The main reason for exploring these questions is the fact that adult learning is seen as key to the achievement of a ‘competitive and dynamic knowledge based society’ as stated in the Lisbon goals (Holford et al., this volume). Increasing overall participation rates is clearly an important concern for policymakers and practitioners alike. Without reliable data on the size, nature and extent of adult learning, it is impossible to devise effective measures and strategies to promote and support lifelong learning.

Unfortunately, Norway had to be deleted from the analyses because the data collection method in that country deviated from the common guidelines.
policymakers; however, it is also important to work with motivated and satisfied adult learners in order to achieve successful learning outcomes (Keller, 1987). Two key questions are addressed in this chapter. Firstly, we examine differences in reasons for participation by level of the current course and country and control whether the outcomes confirm some old stereotypes, for example, about the more extrinsic motivation of low-educated - and the more intrinsic motivation of highly-educated learners. Needless to say, knowledge about the patterns of motivation is crucial for policies that aim to boost participation in lifelong learning, especially among disadvantaged groups. Secondly, we examine which factors determine the motivation to learn. Determinants at individual, school and system level are included in the analysis, and we analyse what influence the quality of the courses, such as the characteristics of the learning environment and the learning process, exert on learner satisfaction and thus motivation. Lessons can be drawn from this analysis with regard to the key determinants of quality in (formal) adult education.

We start this chapter with a theoretical section on issues related to conducting comparative research on adult education participation and on motivational psychology. The empirical sections of this chapter will build on these theories.

Theoretical framework

Bounded agency model

Participation rates in lifelong learning in Europe differ widely and we can recognise certain general patterns such as the strong performance of the Scandinavian countries and the weak performance of the Southern regions (Boateng, 2009). Attempts to interpret these national differences are often based on welfare state typologies, such as the one presented by Esping-Andersen (1989) (Rubenson and Desjardins, 2009). However, as shown in chapter 2 the inclusion of Eastern European countries in such typologies has been problematic. Previous research by Desmedt et al. (2006) revealed that the innovation and employment rates in national economies are the main factors boosting participation in lifelong learning. The workplace itself is an important provider of training opportunities and high levels of innovation encourages individuals to update their knowledge and skills over their lifetime. However, in market-centered societies, the impact of markets on participation and on inequality in participation is more important than the output of the education system (Roosmaa and Saar, 2010).

In this chapter, we draw on the Bounded Agency Model of Rubenson and Desjardins (2009) (see figure 4.1). When examining barriers preventing participation across a range of European countries, they found that barriers to adult education were present in all countries, but that some countries were more successful in tackling these problems, especially the Scandinavian countries. Therefore, they concluded that decisions to take part in adult learning activities are affected by government measures and initiatives as well as by individual choice. Studies of participation, they argued needed to use a ‘bounded agency’ approach and include the role of various agents in society. Policy measures and structured support – such as monitoring, evaluation and peer review of the lifelong learning process, which is a dominant approach since the Lisbon strategy (see Holford et al., this volume) should try to overcome structural and institutional barriers (see left-hand column of figure 4.1) and individuals should be informed about the learning opportunities available in their region, which is indicated by the rightward arrow. These individuals, in turn, need to identify their own learning needs so that their feedback can be used to refine the educational provision and support – visualised by the leftward arrow. The bottom of figure 4.1 shows that the final decision to participate results from the interaction between these different ‘agents’ and thus goes beyond the individual responsibility of the adult. This recognises a concern expressed by Rubenson and Schuetze (2000) that not all adults have the competencies required to find their own way in the adult education system. If participation is to increase among all strata of the population, governments need to offer guidance and information about learning opportunities and to develop relevant educational provision: ‘If a strategy’s point of departure is the notion that adults are completely self-directed individuals in possession of the tools necessary to seize on adult education opportunities, then that strategy is doomed to widen, not narrow, the educational and cultural gaps in society (Rubenson and Schuetze, 2010)’. 
This chapter analyses the motivation of adult learners to engage in a formal adult education programme. Our understanding of motivation is based on the Expectancy Value Theory of Vroom (1964), further developed into the ARCS model of Keller (1987). While motivational studies often reflect a strong psychological tradition, we incorporate a socio-economic dimension in our research and relate the psychology of learning to issues such as social class and social inequality (Jung and Cervero, 2002).

In Vroom’s view, motivation is the product of the expectancy (i.e. probability of success) and the value attached to a certain task one wants to undertake (in our case, participation in a formal learning activity). Value refers to the experience that participation in the activity is meaningful for one’s personal life and that it will fulfil one’s needs (e.g. the need to increase knowledge or the need to meet new people). A negative assessment of the value of the activity will decrease a participant’s motivation, prevent him/her from enrolling, lead to dropping out or poor performance. Moreover, the participant will make an estimation of the probability of success when undertaking the activity – e.g. obtaining a degree or finding a better job - and will continuously evaluate whether these expectancies are being fulfilled. Keller based his ARCS model on the Expectancy Value Theory and ARCS stands for Attitude, Relevance, Confidence and Satisfaction. Attitude and

Relevance refer to ‘Value’, Confidence and Satisfaction refer to ‘Expectancy’. The ARCS model is a sequential model. It identifies that a positive attitude towards participation is the first step towards engaging in learning. Secondly, the relevance of the course needs to be apparent to any potential learner. The ‘expectancy’ relates to the adult learners’ perceived confidence in his/her ability to complete a course successfully. The last step in the sequential model is the experience of satisfaction. Keller states that satisfaction is the most important step in his cycle, as adult learners with a positive attitude, who understand the relevance of their participation, who have confidence in their own abilities, but are dissatisfied, may drop out and experience lower levels of well-being or achieve poorer learning results. This relation between satisfaction, learners’ performance, retention and achievement has been found in many studies, both in compulsory and post-compulsory learning, and in America, Australia and Europe (Bean, 1985; Tinto, 1993; Baily and Lagdana, 1997; Kuh, 2001; Wolf and Fraser, 2008).

Methodology

Our analysis uses data from a new survey among learners in formal adult education in 12 European countries/regions. All country teams participating in the LLL2010 project committed themselves to collect at least 1000 completed adult learner questionnaires. The national samples were stratified by ISCED (International Standard Classification of Education) level of the (adult) courses, which means that the results are comparable across countries only by ISCED level. Note also that in some countries the survey was not conducted in the whole country but in one or two regions, for instance because education is regionalised (e.g. in the UK or Belgium), or because the country is very big (e.g. Russia).

The main added value of the survey is its particular focus on formal adult education. Results of the Eurostat Adult Education Survey 2007 show that – on average – only 5% of all adults between 25 and 64 participate in formal adult education (Eurostat 2009). This means that data on the experiences and outcomes of this group of learners is limited and to be overshadowed by the larger sample groups. At the same time, it must be borne in mind that our findings cannot be extrapolated to all types of adult learning. Further details about the sampling procedure, the interview method and the questionnaire can be found in the annex to this chapter.

The above presents the theoretical framework and the methodology.
The findings of the survey are now examined.

**Reasons for participation in formal education**

The ‘Relevance’ component in Keller’s (1987) ARCS model - described above – sets out the pre-requisites for successful participation in an adult education. In the literature, most research about reasons for participation in adult education is based on the Houle’s (1961) typology, which distinguishes between three types of adult learners: (1) activity oriented learners, who participate because of social contacts and the pleasure of participation, (2) goal oriented learners, who participate because of a certain indirect benefit - such as a degree or a better job, and (3) learning oriented learners, who are driven by some intrinsic interest in their study subjects. In adult learning surveys (such as Eurostat's Adult Education Survey), on the other hand, reasons for participation are often split up into job related and personal reasons. For the present research, we used parts of the Education Participation Scale developed by Boshier (1977, 1991) to measures reasons for participation. In our questionnaire, we included items on competency-related curiosity, interpersonal relations, community service, escape from routine, professional advancement and compliance with external influence (Garst and Ried, 1999). Based on this 18 items scale, we conducted factor analysis and ended up with two dimensions: ‘intrinsic and social’ and ‘extrinsic’ (or ‘instrumental’) reasons for participation. In the pooled database (including data from all 12 countries/regions), these new components are standardised with a mean value of 0 with a standard deviation of 1. These two dimensions partly overlap with the different 'areas of debate’ in lifelong learning policy, between economic and social objectives (see Holford et al. in this volume). Contemporary lifelong learning policy is believed to be biased towards controlled economic approaches, rather than e.g. social inclusive ones. The first purpose of our analysis was to examine whether the adult learners in this survey expressed intrinsic/social or extrinsic motives for participation.

Table 1 shows how the specific questionnaire items fit into either the intrinsic or the extrinsic motivation dimensions. Intrinsic reasons for participation focus on the learning content but also on social reasons for participation such as meeting new people. Extrinsic reasons include job related reasons for participation as well as external pressure to participate.

<table>
<thead>
<tr>
<th>INTRINSIC AND SOCIAL</th>
<th>EXTRINSIC</th>
</tr>
</thead>
<tbody>
<tr>
<td>To learn more on a subject that interests me.</td>
<td>To earn more.</td>
</tr>
<tr>
<td>To participate in group activities.</td>
<td>Because my employer required me to enrol.</td>
</tr>
<tr>
<td>To contribute more to my community.</td>
<td>To do my job better.</td>
</tr>
<tr>
<td>To gain awareness of myself and others.</td>
<td>Because someone advised me to do this.</td>
</tr>
<tr>
<td>To get a break from the routine of home and work.</td>
<td>To start up my own business.</td>
</tr>
<tr>
<td>To learn knowledge/skills useful in my daily life.</td>
<td>Because I was bored.</td>
</tr>
<tr>
<td>To contribute more as a citizen.</td>
<td>Because I was obliged to do it.</td>
</tr>
<tr>
<td>To meet new people.</td>
<td>To get a job.</td>
</tr>
<tr>
<td></td>
<td>To be less likely to lose my current job.</td>
</tr>
<tr>
<td></td>
<td>To obtain certificate.</td>
</tr>
</tbody>
</table>

Figure 4.2: Intrinsic versus extrinsic reasons for participation by ISCED level of the current course

![Figure 4.2](image)

Source: LLL2010 adult learners’ survey (2007)

Figure 4.2 shows the different levels of intrinsic and extrinsic motivation according to ISCED level of current course. The score 0 indicates the average so ISCED level courses above 0 have an above average score; those below 0 are below average. As can be seen, learners on ISCED 1 and 2 courses have the highest average score on...
both the extrinsic dimension and the intrinsic dimension. These results indicate that although learners at the lowest levels may be motivated to study to get or retain a job, or may be compelled to study; they also value the social aspects of learning. In contrast ISCED level 5 learners have the lowest extrinsic motivation for learning; those at ISCED 3 have the lowest intrinsic motivation and ISCED level 4 learners have a similar level of intrinsic motivation to those at levels 1 and 2. Note that although the differences between the averages by ISCED level are statistically significant, they fall within a limited range (up to 0,1 or -0,15 standard deviation).

**Differences in motivation patterns between countries**

Figure 4.3 shows the differences between extrinsic and intrinsic motivation for each of the countries which are ranked by order of ‘average extrinsic motivation’. Actually, the averages are somewhat artificially ‘re-weighted’ across ISCED-levels as if participants were equally spread across levels: in other words, the country averages are ‘corrected’ for differences in the composition of the target population by level of education.

The differences between countries were statistically significant, particularly in relation to the extrinsic dimension, with Western European countries scoring below the mean (M=0) for extrinsic motives and Eastern European countries scoring above the mean. Flemish learners score very low on the extrinsic dimension, while Bulgarian learners score very high. There was less evidence for country differences in relation to intrinsic and social motives; however Scotland and Ireland are the positive outliers here, while the Czech Republic and Austria have the lowest scores. These results, in general, point to a strong influence of the policy priorities in different countries (Boeren and Holford, 2010). The countries that score highest on extrinsic reasons for participation, such as Bulgaria and Lithuania, are countries with the lowest standards of living based on GDP, although these differences may also relate to special requirements for some occupational groups in post-socialist countries. By contrast, the countries that score highest on intrinsic and social motives (especially Ireland and Scotland) are typically those where government policy on lifelong learning include emphasis on the social as well as the economic dimension. (Holford et al., 2008).

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**Goodness of fit statistics for intrinsic motivation:** $F=18.669; \ df=3; \ p=.000$. For extrinsic motivation: $F=17.705; \ df=3; \ p=.000$. 

![Figure 4.3: Intrinsic versus extrinsic reasons for participation by country/region](image-url)
Figure 4.4: Age distribution of adult learners by country/region

![Age distribution chart]

Source: LLL2010 adult learners’ survey (2007)

Figure 4.4 shows that the sample included large numbers of young adult learners in some countries. In Austria, Estonia and Russia half the sample was below 25 years of age. Our criterion for inclusion in the sample was that an adult learner was someone who had left the initial education system at least two years prior to the survey. This suggests that, at least in these countries, returning to formal education often occurs at a relatively young age. It also raises questions about the sampling strategy of the Eurostat Adult Education Survey, where adults younger than 25 are excluded.

Looking at the differences in initial educational attainment of participants between the countries/regions in our sample (see figure 4.5), we notice that adult learners in the Western European countries, with the exception of Austria, have a larger proportion of adults with tertiary education than adult learners. This may go some way towards explaining the lower extrinsic pressure felt by participants in the Western countries: as they are often employed in more knowledge intensive jobs, the benefits of their learning activities are more obvious. For lower educated adults, the benefits may be more uncertain as they often do not have a (permanent) job or are employed in rather monotonous jobs. Participation in a learning activity can possibly help them to secure their position on the labour market and/or find a more interesting job. Furthermore, it might be related to other aspects such as the actual courses available to adults with some focussing more on leisure oriented aspects instead of labour market aspects and that there were more older (and sometimes already retired) adults in some country samples.

Figure 4.5: Educational attainment of adult learners by country/region

![Educational attainment chart]

Source: LLL2010 adult learners’ survey (2007)

Characteristics of the institutions and the courses

The extent to which schools can affect the performance of their pupils has been discussed extensively. Around 50 years ago, Coleman et al (1966) argued that the main influence on the outcomes for pupils was their socio-economic and socio-cultural background. Later research demonstrated that schools were capable of having an impact and that they could reduce inequalities between pupils, although the socio-economic background of the pupils remained a powerful determinant of their future educational progress and outcomes (Mortimore et al., 1988).

In the LLL2010 research, we were also interested in the characteristics of adult education institutions and how these are related to the motivation of learners. In this section, we start by identifying some key characteristics based on an international comparative study by Schuetze and Slowey (2002) who argued that, in recent decades, (adult)
education systems, have evolved from rather fixed to more flexible systems with the following characteristics:

- **new contents**: more relevant courses;
- **institutional differentiation**: e.g. horizontal and vertical differentiation, articulation and transfer routes, greater student choice and better information, less dead-end routes, more equivalence between general and vocational routes, coordination between different sectors/programmes;
- **institutional governance**: greater institutional autonomy and flexibility;
- **access**: e.g. specific policies and outreach strategies for lifelong learners, open or flexible access, recognition of work and life experience, special entry routes, financial and other support, appropriate scheduling, involvement in regional development/service for the community;
- **modes of study**: e.g. modular courses and credit transfer, part-time programmes, distance learning, independent study;

Although Schuetze and Slowey focused on higher education it is clear that there have been considerable changes in tertiary education, an OECD report of 2008 also comments on the diversification of institutions at tertiary level. This report also notes changes in course provision and links to the external world as well as a stronger emphasis on social and geographical access to tertiary education (OECD, 2008). In what follows, we examine (as far as possible) to what extent these trends have permeated adult education systems in the study countries. First, we explore some main differences in characteristics of the adult education system by ISCED level; and next, differences by country/region are explored.

**Differences in institutional structures by ISCED level**

Admission requirements obviously differed by ISCED level (see figure 4.6): certificates of prior qualification as well as admission tests were more common at higher ISCED levels, typically reflecting the ‘ladder’ structure of formal education. Nevertheless, even at the lowest levels, learners often had to demonstrate that they have the appropriate level of skills and knowledge to attend the course (e.g. a certificate of primary education to enrol for an ISCED level 2 course). This mechanism is positive and negative: on the one hand, a skills assessment enables providers to respond accurately to each learner’s specific needs, even at the lowest levels; on the other hand, it may in some cases deter adults from entering a course at an appropriate level because they are lacking the correct qualification. Nowadays, institutions are working towards more open access, in the United Kingdom the Open University requires no qualifications for enrolling on a higher level course; in Flanders the Open University offers accreditation of prior life experiences outside education. Moreover, National Qualification Frameworks have been or are in the process of development. These frameworks are intended to enable recognition of all competences obtained within and outside educational settings, in order to widen access to further learning arrangements (Holford et al., this volume). However, open access is not yet achieved in most countries, e.g. in Bulgaria – and by extension in other post-socialist countries - where completion of the previous level is a precondition for climbing the educational ladder or in the Czech Republic where procedures of recognition of previous experiences outside the educational system are not yet in use.

![Figure 4.6: Admission requirements by ISCED level of the current course](image-url)

Source: LLL2010 adult learners’ survey (2007)

Another general pattern across ISCED levels relates to course organisation (see figure 4.7). Whereas classical linear year systems were the rule in the past, more and more institutions now provide modular courses. This flexible mode of organisation makes it possible to enrol in separate modules without having to commit to completion of the overall qualification. The credits granted after the successful completion of each module can be accumulated over time to obtain a full qualification.
Our survey showed that modular systems were already fairly common at the highest levels of adult education systems. Whereas most courses at ISCED 1 and 2 level appear to have kept their linear structure, the higher education system in particular has undergone significant transformations in the period following the Bologna agreement. However, a different explanation for a seeming lack of modularisation at the lower level is that these programmes are of a very short duration. This is the case in the UK where a course in basic literacies may consist of 20 to 30 hours over a period of 3 months. Although there is a modularisation in universities, the requirements of the overall final award, e.g. a bachelor award, is such that full-time students are likely to enrol for the entire academic year and their course could be seen as part of a linear structure.

Figure 5.7: Modular system by ISCED level of the current course

![Figure 5.7: Modular system by ISCED level of the current course](image)

Source: LLL2010 adult learners’ survey (2007)

An analysis of class sizes by ISCED level showed that classes were generally smaller at level 1 and 2 courses than in higher education (see figure 4.8). At the lower levels class sizes are comparable to those in initial education, allowing teachers to closely monitor the progress of individual participants. Further analyses on teaching methods used during the course revealed that students at the lowest ISCED level courses got more opportunities for one-on-one guidance from the adult educator compared to students in higher level courses.

Figure 4.8: Class sizes of 21 and over by ISCED level of the current course

![Figure 4.8: Class sizes of 21 and over by ISCED level of the current course](image)

Source: LLL2010 adult learners’ survey (2007)

Differences in institutional characteristics between countries

Apart from general patterns by ISCED level, our survey also revealed differences in characteristics of adult education settings between countries. In the Central and Eastern European countries, the adult education system is much more embedded in the initial education system. The provision of daytime education is very similar to primary or secondary compulsory education; in contrast, in Western European countries/regions, the formal adult education provision is typically organised in different institutions. This suggests that the Western systems are more flexible. One example of this is the frequency of classes. Especially in Flanders, England and Scotland, adult learners generally have to attend the institution fewer than three times per week. In contrast, in all the Eastern European countries except the Czech Republic, learners have more frequent classes. In countries such as Bulgaria and Lithuania, the programmes are particularly intensive and class-based. This difference is partly explained by the presence, in the sample, of many rather young early school leavers who want to gain their upper secondary certificate in these two countries.

An examination of barriers hindering participation, shows that adult learners in Flanders, England and Scotland experience fewer barriers than in most Central and Eastern European countries. Austrian learners experience more barriers compared to other Western European
countries. Barriers mentioned most frequently are too little time for studying, financial difficulties, transportation problems, lack of preparation for the current course and inconvenient time scheduling. There were also differences between the countries in relation to the perception of the classroom environment. Previous research has indicated that learners feel better and perform better if they are academically and socially involved, and if they feel connected to each other, the adult educator and the educational institution (English, 2005; New England Adult Research Network, 1999; Tinto, 1998).

In our survey, the classroom environment was measured using the Adult Classroom Environment Scale of Darkenwald and Valentine (1986). O’Fathaigh (1997) used this scale in his research and extracted the following sub-dimensions of classroom environment:

- **affiliation**: the extent to which students like each other and interact positively with each other;
- **teacher support**: the extent of help, encouragement, concern and friendship experienced from teachers;
- **task orientation**: the extent to which students and teachers maintain focus on task and value achievement;
- **personal goal attainment**: the extent to which the teaching process is flexible, providing opportunities for adults to pursue their individual interests;
- **organisation and clarity**: the extent to which activities are clear and well organised;
- **student influence**: the extent to which the teaching is learner-centred and allows for student influence in course planning decisions;
- **involvement**: the extent to which students participate actively and attentively.

Factor analysis on our dataset revealed that it is possible to synthesise these items into a single reliable ‘classroom environment’ variable. Figure 4.9 shows the average factor scores for each country/region (standardised around mean = 0, standard deviation = 1). The figure shows that the perception of the classroom environment is generally more positive in Western than in Eastern European countries ($F=86.349; df=11; p=.000$). The highest scores are found in the Anglo-Celtic countries, and the lowest ones in the Czech Republic and Slovenia. However, it could be argued that the differences between Russia, Belgium (Flanders), Estonia, Bulgaria and Lithuania are marginal as they are all close to 0. These differences could to some extent be explained by the different courses attended by these learners. The content and length of programmes, but also the type of institutions providing formal adult education is very diverse in European countries. Overall, courses in Eastern Europe were more focused on gaining a qualification; whilst in England and Belgium the courses were more leisure oriented. Hence formal adult education has a ‘wider’ definition in most of Western European countries studied here. In the following section, we explore the extent to which the classroom environment affects the motivation of the participants.

**Figure 4.9: Perception of the classroom environment by country/region**

![Perception of the classroom environment by country/region](chart)

Source: LLL2010 adult learners’ survey (2007)

**Determinants of learner satisfaction**

Whereas in the previous section our attention was focused on different quality characteristics of formal adult education, as perceived by the participants, we now examine the link between quality of provision and student motivation. An important limitation of this analysis is that our dataset included only those that were participating in learning. This could result in bias as it would be expected that only the more motivated learners actually enrol in courses and stay on. However, only participants will have sufficient knowledge to enable them to make a reliable assessment of the quality of programmes. It is clear though that word of mouth from current learners may influence non-learners.

Looking at Keller’s (1987) ARCS model of motivation, the participants that took part in the survey have in most cases reached the last stage of the ‘chain’ of motivation: satisfaction. Whereas none of them would have participated without sufficient levels of ‘attitude’, ‘relevance’ and...
‘confidence’, it seems plausible to assume that there may still be some variation in the level ‘satisfaction’ with the learning experience. We therefore suggest that it is possible to examine whether there is a meaningful relationship between learner satisfaction and the characteristics of the courses discussed above.

**Level of satisfaction with the learning experience**

In the questionnaire, satisfaction with the learning process was measured by four different topics: general progress through the study programme; overall learning climate in the educational institution; satisfaction with the practical organisation; and, satisfaction with the learning outcomes. This last item consisted of two sub-questions: what you have learned so far thanks to the course, and what you can go on to do after completion of this course. These provided five items which were used in a factor analysis to produce a new standardised component measuring level of satisfaction overall. The component score has a mean of 0 with a standard deviation of 1; countries above the mean of 0 have an above average score; those below 0 have a score that is below the overall average.

Again, like the results on reasons for participation, there is a difference in levels of satisfaction between Western European and Eastern European countries. The Western European countries score above average and the Eastern European countries with the exception of Russia score below average. However, the differences between Russia, Belgium (Flanders), Lithuania, Bulgaria and Estonia were not significant.

**Determinants of learner satisfaction**

In order to examine the determinants of learner satisfaction we used a stepwise multiple regression analysis as this allows us to examine the impact of a number of potential factors. The ‘stepwise’ approach means that we identified four sets of variables that can help explain why some participants are more satisfied than others. These four sets of variables were:

- those relating to personal characteristics of the adult learners, such as gender, age, educational attainment and activity status
- barriers that may hinder the learning process. These barriers relate to time pressure, lack of financial resources, health problems, etc.
- individuals’ perceptions of the classroom environment as discussed above and shown in figure 4.10; this included the relationship between learners; learner engagement in the learning process and ability to pursue their own interest; and teacher support, organisation of the learning and task focus.
- the characteristics of the course and institution such as the frequency of classes, the type of teaching method and modular versus linear organisation

These variables were entered into the multiple regression analysis in a stepwise manner which allowed us to determine whether held greater explanatory power than the other variables. As we were also interested in exploring this in relation to causal relations between subsets of countries we ran separate analyses for three clusters of countries Austria and Flanders (continential / corporatist welfare regime); England, Ireland and Scotland (liberal / Anglo-Celtic regime); and the CEE countries (transition regime).

Figure 4.11 shows the results of this four-step analysis. Step 1 shows the impact the personal characteristics of the learner; step 2 indicates the influence of barriers on overall satisfaction; step 3 highlights the impact of the classroom environment; and step 4 that of the characteristics of the course and the institution. It can be seen that the classroom environment is by far the largest influence on learner satisfaction in all of the country clusters. Separate regression analyses for each country confirmed that this was also the case in individual countries. The personal characteristics shown in step 1 had a slightly larger impact in the Anglo Celtic countries than the others; barriers to participation were more in evidence in the continental countries and least in the Eastern European countries. The characteristics of the institutions featured to some extent in the continental and Eastern European

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39 Further details about the regression analysis can be found in the annex to this chapter, or in Boeren et al. (2011)
countries but not at all in the Anglo Celtic countries. However, as already said we can conclude that the perception of the classroom environment is highly important in fostering the motivation of adult learners. This seems to be case irrespective of the macro-context of the country under consideration. In other words, our survey suggests that the generally lower level of satisfaction of adult learners in CEE countries is not due to macro level influences, but is likely to be caused to a large extent by a poorer classroom environment in those countries.

Figure 4.11: Variation in satisfaction by country clusters

The main aim of this chapter was to analyse the profile, motivation, perceptions and experiences of adult learners in the formal adult education system across European countries/regions. The target group was defined as adults of any age re-entering the education system after having left the initial education for at least two years.

The characteristics of the adult education systems differ widely between countries, and these differences are reflected in the national profiles of adult learners. In Flanders, England and Scotland, adult learners have a higher average age and a higher proportion of adults with tertiary qualifications. In most Central and Eastern European countries, the adult education system is intertwined with the initial education system which results in less flexible modes of learning (Hefler, 2010). On an overall level, our findings show that the perception of the classroom environment and the overall satisfaction with various aspects of the course is significantly lower in these Central and Eastern European countries.

We began with an analysis of why adult learners engage in learning, looking at the distinction between intrinsic and extrinsic reasons for enrolling in formal adult education. While intrinsic reasons for participation are present in all countries/regions, the extrinsic reasons differ more across countries and tend to be more prevalent in CEE countries. Overall, these findings may be considered as encouraging. In motivational psychology, extrinsic motivation often has a rather negative connotation, associated with poorer performance and a lower level of well-being (Deci and Ryan, 2000). Our results suggest that extrinsic and intrinsic reasons for participation can go hand in hand. For example, newly arrived immigrants may be obliged to undertake introduction course into the language and culture of the host country, but they can also be intrinsically motivated because of their interest in the new country and their wish to integrate in an effective way. Similarly, the stronger economic pressure felt by adult learners in Eastern European countries does not mean that they are necessarily less intrinsically motivated. We also found that participants in courses at ISCED levels 1 and 2 show stronger intrinsic and social motives than those at level 3, ‘despite’ the fact that they are also more extrinsically motivated. This contradicts popular stereotypes that low-educated adults are generally ‘not motivated’ and shows that mandatory measures are not always needed to make them participate in lifelong learning. It is also possible that motivation which was initially extrinsic can lead to intrinsic motivation at a later stage. A longitudinal study may enable to confirm this hypothesis in future research.

We have also demonstrated that the motivation of the adult learners can be further boosted by creating a positive classroom environment – the second point of attention in this chapter. In all countries/regions, adult learners reported higher levels of satisfaction when they were actively involved in the learning process, enjoyed support and respect from the teacher and where the study programme was well organised and had a clear sense of direction. These results point to the importance of a careful match between adult learners and adult educators so that learners can enjoy learning more.

Nevertheless, on the orginal five-point item scales for subitems relating to satisfaction and classroom environment, average scores per country exceeded three in most cases.
What lessons can be drawn for education policy and practice from these results, and what issues should be considered for further research?

Firstly, the striking country differences in the extent (see Boateng, 2009) and reasons for participation in (formal) adult education raise questions about the feasibility of a one-size-fits-all EU policy with specific targets and policy measures (Dehmel, 2008). There is no doubt that a European approach is needed to guarantee competitiveness and innovation, but based on macro indicators and study of the social, economic and cultural development of separate countries, we have to conclude that a differentiated strategy is desirable (Holford et al., 2008). Adult learners in Eastern European countries in our sample were generally younger, had lower levels of qualifications (in comparison with England, Scotland or Flanders) and were therefore more likely to be focused on gaining qualifications and improving their labour market prospects. It is important to note though that the labour market, educational and family structures are very different across countries. It is therefore essential that national governments design their own strategies rather than uncritically copying the EU agenda.

Secondly, we need to stress the limited character of a single survey. Without longitudinal data, we cannot know whether unsatisfied adult learners left their course, nor whether adults saw their initial expectations – such as finding a new job - fulfilled after completion of the course. Because of this limited exercise, it is difficult to draw conclusions about the effectiveness of the adult education system. A longitudinal survey would obviously be expensive and complex, but nevertheless, it would be of great value to the adult education field. Because participation is a process, it would be useful to undertake qualitative research to understand the process of adult learning. This should include gathering information about how they found about the course in a course, their experiences at various moments during the course and to follow up the outcomes of learning afterwards. It would also be of interest to follow up dropouts and to gather information about their reasons for leaving the course.

Thirdly, as classroom environment variables explain a great deal of learners’ satisfaction – and as teachers have a determining impact on the classroom environment – additional research on the role and competence profiles of teachers in adult education becomes a logical next step. Little is known about this key profession; in many countries, specific training for adult educators does not even exist. Research by Jogi and Gross (2009) states that the professionalisation of adult educators is just starting in the Eastern European countries such as the Baltic States. In Flanders teacher training focuses mainly on teaching for compulsory education, and not all adult educators have a teaching qualification (Boeren, 2011). In contrast, as mentioned above, teaching qualifications for staff in tertiary education have been the focus of attention in the UK. In Scotland around 90% of full-time teaching staff in further education colleges have a teaching qualification specifically for teaching adults and this was where most of the learners in the LLL 2010 survey were located. Royce (1999) stated in her research that high-quality learning environments only emerge when adult educators are well-trained and high-functioning professionals and that educational institutions should offer them secure employment contracts. In addition to expertise in their teaching subject, adult educators must have strong social and pedagogical skills and be able to monitor the needs, talents and ambitions of each individual adult learner.

Research into the profile of adult educators is highly recommended. In many countries, there is little information about who they are, what qualifications they hold, what previous teaching experience they have and whether they are active in other segments of the labour market. While several authors have focused on the needs and psychology of the adult learners, we do not know whether these European adult educators master the competencies to take these needs of the learners into account (Tennant, 2006; Brookfield, 2006). Overall, our research suggests that there is an urgent need to analyse the professional profile of adult educators in greater detail.

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Adult Education in Germany and the United States of America
A methodological approach towards researching differences and similarities in the discipline’s self-concept

During the 20th century, a number of countries introduced university programs in adult education. This phenomenon gave rise to the development of a new academic (sub)discipline. The newly established academic faculties and their graduates had to build up a new identity for this new field. This leads to the research question: What are the differences and similarities in the discipline’s self-concept on the subject of adult education in Germany and the US?

This comparative research question seeks, firstly, to establish differences and similarities in the self-concept of adult education in Germany and the US. Secondly, it researches the reasons for these differences and similarities. Thirdly, it examines the consequences of these differences and similarities for adult education in the countries covered by this research. Within the methodology of comparison, it is important to be aware that it would not be sufficient to merely identify and present the differences and similarities. It is also necessary to provide a detailed analysis of why these similarities and differences occur and an understanding of their meanings for the field of research (Reischmann, 2008).

Document Analysis
The first step will be to carry out an analysis of relevant literature in order to establish the differences and similarities. Two basic handbooks have been selected, each representing the “state of the art” and generated by the academic field of adult education in Germany and the US respectively. The literature chosen to be analyzed for the American perspective is the Handbook of Adult and Continuing Education, which is representative of the subject matter in the field; three different editions will be considered. The literature used for the analysis of the German perspective is the Handbuch der Erwachsenenbildung/Weiterbildung (Handbook of Adult Education/Continuing Education), which is also representative of the subject matter in the field; two different editions from approximately the same period of time will be considered. A new edition of the American handbook is published every ten years, whereas the first edition of the German handbook was published in 1994 and another revised edition in 2010. The American handbook is published by the American Association for Adult and Continuing Education (AAACE). The AAACE published the first handbook, at

41 In the following, the term “adult education” is used to include both adult and continuing education.
that time called *Handbook of Adult Education in the United States*, in 1934. Every edition has a different group of editors. The German handbook, however, was first compiled in 1994 by a scholar from the field and the second, revised edition was edited by the same person with the help of another scholar.

The reasons for choosing these two handbooks are to find a detailed overview of the field of adult education. The task was to find publications that explore the heterogeneous perspectives in adult education in both countries. These handbooks represent the perspectives and opinions of scholars of the discipline from both theoretical and practical backgrounds in order to gain a deep insight into the field. Another reason for choosing these handbooks was the possibility of comparing them. The handbooks were both written out of the same contexts and for the same reasons.

For the American perspective, the 1989 edition of *Handbook of Adult and Continuing Education*, edited by Sharan B. Merriam and Phyllis M. Cunningham, the 2000 edition edited by Arthur L. Wilson and Elisabeth R. Hayes and the up-to-date edition from 2010, edited by Carol E. Kasworm, Amy D. Rose and Jovita M. Ross-Gordon, were chosen to be analyzed. As mentioned above, these handbooks represent a state-of-the-art overview of the field. The aim of the handbooks is to identify and analyze all the major issues and problems facing the field of adult education and “to provide a reference that both defines and interprets the field from the viewpoints of a cross section of leaders within the profession” (Merriam & Cunningham, 1989, p. xvi). The authors contributing to the handbook are both theorists and practitioners, all scholars from the field with a high level of expertise.

For the German perspective, the 1994 edition of *Handbuch Erwachsenenbildung/Weiterbildung* (Handbook of Adult Education/Continuing Education), edited by Rudolf Tippelt, and the up-to-date 2010 edition, edited by Rudolf Tippelt and Aiga von Hippel, were chosen to be analyzed. The aim of the German handbook is very similar to that of the American handbook. It sets out to give a systematic representation of the field of adult education and to gather the up-to-date knowledge of the discipline in one volume. A set of authors were chosen: scholars representing different fields of the discipline coming from both contexts and for the same reasons.

Analysis of the Differences and Similarities

The analysis of the literature follows the principles of grounded theory developed by Glaser and Strauss. Grounded theory is a methodology to develop a theory out of the data rather than review an already existing theory. One of the key concepts in grounded theory is comparison. The ongoing comparison that is necessary within this research method leads to the generation of a new theory. Therefore it is important to follow the principle of theoretical sampling, i.e. using data which is supposed to lead to new knowledge. Before describing the methodological procedure, it is important to make clear that grounded theory is not supposed to be a linear and chronological process of research. Rather, it involves going back and forth in the data and the research findings in order to reach a new and deeper understanding of it. Grounded theory provides guidelines and orientation support during the process of analyzing. The central point of this method is the coding that is done throughout the research process. (Kuckartz, 2010).

Nevertheless, the following description of the methodological procedure is described linearly and chronologically.

When analyzing the data in accordance with the principles of grounded theory, the first step is the open coding.

According to this parameter, the first step is to examine each single edition of each handbook independently from each other in order to identify codes. Codes are detecting benchmarks that help to gather the key points of the data. After developing a number of codes, the next step is to find out which codes can be merged. On the basis of these codes, concepts will be developed. In this context, concepts are a grouping of codes with a similar content to merge the data again. These concepts will be reviewed in the following research process. By the end of first step, there should be a list of concepts that can be put together in categories. The categories are groups of related concepts, i.e. a classification of concepts. Strauss sees a category as an independent part of a theory and by comparing concepts to each other the classification will occur. This leads to a concept of higher order, a so-called category. Categories contain characteristics with important theoretical aspects (Kuckartz, 2010, p. 75).

When the open coding has been done, the next step is the axial coding. Axial coding means putting the data together in new and different ways. It is important to create connections between the categories. Axial coding focuses on certain categories and their relations to each other, in order to identify the core categories of the research field (Kuckartz, 2010).

Following the axial coding is the selective coding, which aims to build up a theoretical concept. In this phase, core categories will be put together systematically and put in relation to group the data. While doing this, it is important to only focus on the concepts and categories that are relevant to answer the research question and to develop a theory. The other concepts and

It is important to point out that the procedure described above will be done with the different editions of the American handbook and separately with the editions of the German handbook. The aim is to generate a self-portrayal of the discipline within the historical, cultural, social and disciplinary contexts and the developments in both Germany and the US.

**Interviews**

Having completed this analysis, the second step is to develop a questionnaire in order to conduct interviews with representatives from the academic field of adult education from both countries: firstly, to control the understanding developed in the literature analysis; and secondly, to verify the analysis of the developments that caused the similarities and differences in Germany and the US.

Six representatives from the academic discipline of adult education from each country will be interviewed: two representatives from each country in each of the following age groups, 35–45, 45–60, and over 60; and from each country, three women and three men.

The interviews in Germany will be conducted in German and the interviews in the US will be conducted in English. All interviews will be transcribed and analyzed in the interviewing language.

Finally, the 12 interviews will be analyzed. Again, the analysis of the interviews will follow the principles of grounded theory. The procedure will be the same as described for analyzing the handbooks.

**Expected Outcomes**

Expected outcomes of this research are the identification of similarities and differences within the self-understanding of the discipline between the US and Germany. There will also be an attempt to understand why the differences and similarities occur and what they tell us about adult education in these countries.

A study in comparative international adult education ... must include one or more aspects of adult education in two or more countries or regions ... comparison ... attempts to identify the similarities and differences between the aspects under study ... The real value of comparative study emerges only from ... the attempt to understand why the differences and similarities occur and what their significance is for adult education in the countries under examination ... (Charters & Hilton, 1989 cited in Reischmann, 2008, p. 10).

This will provide an opportunity to widen the view on the discipline and profession of adult education in both Germany and the US.

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Research Problems in Andragogy: Comparative Considerations

Abstract

Research in andragogy cannot be reduced to research techniques. It includes theoretical ground as well. Theory is a research base for understanding.

Philosophy is very important for research andragogy: spiritual values, aims of education and learning, conceptions of an adult person, andragogical ethical reflection on theory and practice. Research in andragogy has its research context.

The problem of methodology has been neglected. Research methods and procedures are not separate from philosophical grounds. Contradictions have appeared in andragogy over whether one should create knowledge through research or borrow the knowledge from other sciences. Since andragogy has become university discipline, the link between teaching and research has been asked for.

Key words: andragogy, research, methodology, philosophy, ethic, comparison, methods, techniques.

Approach to the problem

The establishment of a science depends on the scope, quality, type and nature of the research. Through research we are accumulating knowledge that is assisting us in the formulation of the theory and enabling the efficient solution of life's questions and problems. Dynamic practice of adult education and learning is not sufficiently followed by research. There are reasons for that, for example, it was thought that education and learning are part of social practice, so the teaching in this field did not need specific tasks. On the other hand, practicing andragogists themselves were encouraging such pragmatism. Turning point occurred when universities opened doors to andragogy (adult learning theory) as a course subject and as a field of research.

There are different types of research in adult education and learning. Some authors (Merriam and Simpson, 1984) stated that: "research is a systematic process by which we learn more about something than what we had known before we engaged in that process" (p.2). Over time, a division to basic (fundamental) and applied research happened. In the area of adult education both types of research can influence practice of andragogy. The results of basic research can have practical application while applied research may lead to the formulation of the theory.

Debates over the conceptual framework of research, from a comparative
perspective, are present in the andragogical literature. Conceptual frameworks are not unique. This diversity does not necessarily mean anything negative, it can also contribute to a theoretical basis for andragogy. The practice of adult education and learning varies, therefore, research interests are dissimilar. Research in the field of adult education and learning has its own distinctive methodological characteristics and applications of research methods and techniques. This does not mean that adult education is not using a general research methodology of social sciences, but its use is specific and not mechanical. The uniqueness of the research in the field of andragogy is the subject of exploration itself. It involves the application of the appropriate methods and techniques. Methodology in adult education cannot be equated with the term method, because it has much wider dimensions. It examines the scientific systems and their structure, research techniques and procedures, and ways of evaluating their effectiveness. Methodology can never be reduced to technique, because it would imply its impoverishment. Researcher in the field of andragogy who intends to study these problems must be sure that they are relevant for both the society in general as well as for the implementation of the adult education practice. Research should always contribute to the solving of the problems that are vital to society. Other important goal is making sure that the results of the research can be used in adult education and learning practice. These are two requirements that cannot be overlooked in any type of research. This further means that research should lead to the logical and practical measures.

In andragogical research (as in all others), the researcher needs to be fully unbiased. Besides, the work of researcher is not a private matter. This work needs to be of interest to others. This further means that researcher has to be fully aware of the needs and demands of the society. Researcher can be affected by personal prejudices that he/she must overcome. It is essential that researcher possess the knowledge of both traditional as well as non-traditional methodological approaches, the original ways of exploration, and the ability to create new hypotheses, if the existing ones are not valid anymore.

The need to put more emphasis on non-traditional approaches to research in adult education and learning is growing. The conventional approach to research seeks to explain the phenomena in a strict traditional way. This approach drew lots of criticism. Among the critics particularly notable was Canadian theorist Hall (Hall, 1977). His criticism was mainly directed at a survey research in adult learning and education. Hall pointed out that this approach simplifies the social reality. In addition, it is often alienated from the environment and the adults who participate in the study, and is not consistent with the approach and philosophy of adult education. In survey research, past can be quickly forgotten. And that is one of its biggest drawbacks. Past and present have its own interactions that run from one end to the other in the whole process. Special criticism of this research method is focused on the fact that the subjects participating in the study do not have any opportunity to influence the research process. Such an approach does not allow respondents to actively participate in research. Some American authors (Apps, 1972) were severe critics of the traditional approaches to andragogical research. Apps argued that the traditional approach to research in the field of adult education and learning does not provide useful knowledge.

Additionally, there are problems with terminology associated with the research in the field of adult education and learning. Each discipline, including andragogy, seeks to refine and structure its own conceptual apparatus. Clear and strong terminology is essential in establishing the scientific value of a discipline. When it comes to adult education and learning, terminology distillation is only at the very beginning. This area is rich in terms, but lacking in their accuracy. However, the improvements are starting to emerge. Adult education dictionaries and encyclopedias have been published in various countries. These are the tools and resources that will contribute to the escalation of research in adult education.

The Roots and the Development of Research in Andragogy
This topic can be the whole study in itself. Due to the space limitations we are able to present it in its framework. Contemporary discussions often emphasize that research in the field of adult education and learning is a recent development. This is only partially true. Study of adult education and learning has deeper roots in the history of human civilization. It is possible to establish a historical vertical of ancient civilizations to the present time. Naturally, it was not a disciplinary research. Experiential knowledge of adult education differs from one European country to another. Emerging of the new institutions of adult education in England and France created the foundations for the development of the global adult education movement. World association for adult education is established. Adult education research (on a comparative basis) appeared in the first decades of the 19th century in England. In 19th and the first decades of the twentieth century, there is a movement in Russia of studying the experiences gained in adult education in England, France, Germany and the Scandinavian countries. Russian authors not only described what the adult education status and conditions were in other countries, but also compared it to the Russian methods at that time. In the early years of the twentieth century, work done by E. N. Madinski set forth the theoretical foundations of andragogy, helping to establish the adult education and learning as a scientific discipline. Scientific approach to adult education and learning in particular came to the fore at the All-Russian Congress of Extracurricular Education in 1919. At the same congress, the importance of research, particularly experimental research in adult education and learning was strongly emphasized, in addition to theoretical and historical research.
At the beginning of the twentieth century the new trends and initiatives for empirical research are starting to develop in England. These spread to the other countries in the continental Europe, North America and Africa. This process of expansion was not possible without comparisons. This is the most fully evident in the renowned report of the Ministry of Reconstruction in 1919. "We are aware of the difficulty of comparisons. Education is intertwined with other conditions and institutions as well as national traditions. It is developing in correlation to specific needs and is influenced by variety of factors that fluctuate with time and circumstances. It is impossible, therefore, to judge the education systems without taking into account the political, social and intellectual atmosphere in which they exist." (The Report, 1919, pp. 358). The first comparative research studies in adult education are starting to emerge. For example, the famous English comparatist Sadler (1924) compared all schools for adults in England and folk high schools in Denmark. There have been other studies, for example, Browning Octavio (1920) conducted research and compared the English education of workers and Germany National High Schools and Burger (1926) compared folk high schools in Denmark, England and Germany. Interesting research done by Gertrude Hermes (1927), compared all English and German ventures in adult education and sought similarities and differences among them.

The period from the 1930s provides abundant information about the ups and downs of andragogical research, the continuous efforts of individuals, institutions and organizations to go into more depth in comprehending the problems of adult education and learning. Data and facts show that such studies were not random, but that they were formed from the social, economic and cultural needs of a community. These investigations are intertwined with expanding efforts of other sciences to engage in research activities in the field of adult education and learning. The results were passed on to other countries and became general scientific property.

In the course of the 19th century, Americans started following the path of Europeans, especially the Germans and the French. From the 1930s, they are developing a strong research activity in the field of adult education and learning. These investigations are related to the prominent American psychologist Thorndike and his associates. Thorndike dedicated the largest part of his research in the period from 1925-1935, to adult education and learning. (E.L. Thorndike, Adult Learning and Adult Interests). He insisted on gathering facts about adult education and learning, asserting that the "facts are our best weapon."

In the aftermath of the Second World War, a quiet period ensued in research activities related to adult education and learning. However, with the development of graduate and doctoral programs there is an increasing need for research in this area of education. For example, Professor Houle, from the University of Chicago, one of the pioneers in the adult education field, was a strong advocate of expanding research activities in this area (Houle, 1962). On the other hand, some authors are criticizing research in the field of adult education and learning (Griffith, 1979). But despite these critical objections, no other country devoted more attention and effort to research in adult education and learning than the United States. From 1930 to 1988 approximately 2500 doctoral candidates successfully defended their dissertations in adult education. Also, there was a significant increase in the number of teachers in this field, which was the essential premise of the research (Deshler, 1989, pp. 147). The number of studies was considerable with various orientations. Some authors (Knox, 1985) grouped the research into four categories: the adult learning and development, programming, conduct and evaluation and administration (Knox, 1985, pp. 512). Equally, the results of published research in Canada should not be overlooked. This primarily refers to studies performed by C. Wemer, R. Kidd and A. Tough. Significant research has been carried out at the University of Montreal. The Department of Education at the University of Montreal was granting certificates, master and doctoral degrees, all in the field of adult education. The number of students from the developing countries was increasing, which was particularly important for spreading the spirit of inquiry around the world.

Brazilian educator and theorist Freire made major contributions to the theory and practice of adult education and learning. Freire was placing research in a certain philosophical context, emphasizing that "there is no text without context." From this philosophical approach he derived his methodological belief about research in the field of adult education and learning. He urged the researchers to understand the concrete reality, to understand the relationship between objectivity and subjectivity. The attitude of researcher towards research is essentially an epistemological question. The research methodology is not neutral (Freire, 1973). Freire's belief was that the goal of establishing a good program in adult education and learning could only be achieved through research. From this standpoint it is possible to apply a different organization and different research methods. Freire argued for a participatory approach to the study of adult education and learning. This approach assumes inclusion of individuals involved in the research area being studied. However, Freire did not consider participatory research “a magic wand”, but a means of engaging and enlightening of larger number of individuals, which is consistent with his philosophy of education (P. Freire, 1993).

In the European context, the research of adult education and learning can be viewed and analyzed from two perspectives, Western and Eastern Europe, with a tendency of these approaching and converging to mutual interaction. Western European studies reflect national characteristics and idiosyncrasies. Universities in several countries (France, Germany, the Netherlands, Sweden) offer masters and doctoral programs of study in the field of adult education. But a number of
Institutions outside university systems (Germany, France, Great Britain and Norway) have yielded notable contributions to research in the field of adult learning and education. Useful role, played by the Council of Europe and the European Bureau of Adult Education, should be mentioned. Studies have taken more sociological than psychological approach. Greater emphasis was on the need and the social group, than on the psychological dimensions of adult learning. There have been notable contributions of other disciplines (history, philosophy, psychology, and sociology in particular) to the study of adult education and learning. A somewhat smaller contribution of economics and political science can be noted. European Society for Research in the field of adult education and learning was established in the Netherlands (Hake, 1994). Rubenson criticizes practice-oriented research, referring to it as “non-theoretical”. He says that individualistic perspective prevails in North America, while in Europe the attention is given to participation from the viewpoint of social perspective. It should be emphasized that no form of reductionism (psychological or sociological) is desirable, and that theoretical pluralism is necessary.

Despite the common elements with the rest of the Europe, research in the field of adult education in the countries of Eastern Europe had certain specific traits and was under the influence of earlier Soviet conceptions of pedagogy as an integral science. These ideas, however, have been gradually changing starting in 1960s. In terms of research in adult education, the biggest contributor was renowned Russian psychologist Ananyev, with his aides. The Leningrad school is well known in the field of adult education. The researchers there have conducted experimental investigation of intellectual abilities of adults while supporting the establishment of theory of adult learning and education suggesting differentiation between pedagogy and andragogy (Ananyev, 1977, pp.362). Research has intensified in Czechoslovakia and Poland in the 1990s (Domalewski, 1992). Hungarian approach was very similar to the one developed earlier in Poland and former Yugoslavia. The last decade of the 20th century was the time of major change. Events in the Russian Federation have opened new areas for research. Some authors (Zmeyov, 1998) reported on establishment of new departments of adult education, publishing of numerous studies of adult learning and education, increase in numbers of doctoral dissertations and spreading of the study of andragogy in numerous institutions of higher education. Similar positive trends occurred in Latvia, Estonia, Lithuania, the Czech Republic, Bulgaria and Serbia.

Past comparative considerations indicate that the relevance of research results from one social environment quickly exceeds its limits, becoming a general scientific good or are alternatively rejected as inadequate or outdated. Research in adult education and learning has its own cultural context, which should be taken into consideration when evaluating the theoretical research, adopting methodologies or adaptation and use of other instruments and techniques for data collection. It should also be pointed out that research in adult education and learning has numerous weaknesses of theoretical and methodological nature. These are, through comparative analysis, evident in many countries. The research in the field of adult education will be more widespread and sophisticated in the future. At this stage of its development, andragogy needs generation of new synthesis and generalization from a number of partial studies.

**Philosophical framework of the research in adult education**

Comparative analyses show that adult education can hardly become a theoretical discipline, without its close ties to philosophy. Philosophical reflection on the essence of man is of particular importance for adult education, as well as the resulting interaction and convergence of philosophical and andragogical thinking. The early studies emphasized that the philosophy of adult education represents a challenge to the philosophical and scientific thought. "Only on the basis of adequate philosophy we hope to create a better way of life to which we aspire." (Yeaxlee, 1925, p.6).

Of all the philosophical categories significant for adult education and learning, the values are most often emphasized. It has been argued that erosion of basic values is one of the ills of modern world. The subject of the philosophy of adult education is the human spirit. Philosophy of adult education should have a clear concept of adulthood, and should interpret what it means to be an adult. Both philosophical and andragogical ideas intersect in deliberation of the term “adult”. Philosophical considerations should be built into the foundations of andragogy. Attempts to formulate a “philosophy of work” are a way to combine thinking in andragogy. That does not mean uniformity, but full appreciation for individuality and individual approaches. Therefore it is necessary to know the essence of different philosophical schools and trends of thought.

Goals are philosophical category. The basic prerequisite for consideration in adult education and learning are their philosophical considerations. The objectives of adult education and learning have multiple dimensions. In literature, some authors are indicating goals of adult education as intrinsic, where some others indicate them as instrumental. The first emphasize the development of personality and experience of students, and the others are seeing knowledge and education as means to achieve certain goals, demanding that education needs to be useful and has to have practical value. Supporters of analytical philosophy are critical of adult educators who are imposing social and political ideals in their adult education practice. Advocates of this philosophy strongly believe that adult education should not determine what social and political changes are necessary and needed (Paterson, 1973, pp.357). Others...
reason that adult education cannot be separated from other activities of the society. In the philosophy of adult education, questions are posed about how the objectives are defined: through external factors like the state or through mutual agreement between the teachers and students.

Adult education and learning seeks thorough consideration of ethical issues. The key question to consider is who should make decisions in determining what valuable skills are and what is the useful knowledge. Choice of educational content is not only didactic, but above all ethical issue. Choosing the right educational content requires the moral perspective. Multiple ethical issues and dilemmas are arising in adult education research problems, starting from conceptualization of research, collecting and analyzing data, all the way to their interpretation. The question emerges what are the intentions and purposes of the research, how will the provided knowledge be used and whose property it will be. There is also the question of responsibility of the research team for the consequences of the results. Conclusion can be made that philosophy has a great significance for andragogical research. This points to the close relationship between philosophy and adult education and the need to intertwine philosophical and andragogical beliefs.

Analysis of adult education and learning research suggests that theoretical framework is particularly significant for this field. There is a growing need for creative linking of theory and research. Since andragogy came to be a university discipline it became crucial to connect the teaching and research. Successfully linking them is contributing to creation of a research foundation of andragogy. Research work in adult education should be the basis for teaching. Educators, who base their teaching on research, are influencing the inquisitive spirit of their students and inspire them towards the new scholarly endeavors. Students involved in the research work are provided with the valuable opportunity to learn about the practical problems of research and the use of different examination methods, techniques and instruments.

In previous analyses, we did not include a number of other research problems and issues in adult education, such as the problem of determining research territory in adult education, the types of research, paradigms in andragogical research, the relationship between qualitative and quantitative research, the contribution of other disciplines to research of adult education and andragogical research, the relationship between qualitative and quantitative research territory in adult education, the types of research, paradigms in andragogical research, the relationship between qualitative and quantitative research, the contribution of other disciplines to research of adult education and andragogical research, etc. In terms of research, andragogy faces new problems and challenges.

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The concept of "Governance Regimes": A helpful tool for international comparison in adult education?

1 Introduction

Various international school achievement studies carried out, e.g., by the OECD, point out that there are considerable deficits in national educational systems and discussions regarding how to influence the processes and effects of educational systems are more prominent than ever. The establishment of the principle of lifelong learning does not restrict this focus to the school system only.

The Educational Governance approach (see Altrichter/Brüsemeister/Wissinger 2007) is one of the recently developed perspectives in this field, focused on the school sector in Germany, Austria and Switzerland. It did not, however, have any impact on the study of adult education.

Interest in the topic of governance and the regulation of the adult education sector has increased during the last decade in Germany. A number of publications have been presented, of which the compendium "Steuerung und Organisation in der Weiterbildung" (Governance and Organization in Adult Education) (Hartz/Schrader 2008) is of particular note. What is more, the German Association for the Education of Adults (DGfE-Sektion Erwachsenenbildung) dedicated its annual conference in 2010 to the topic "Governance – Regulation – Organisation" (Hof/Ludwig/Schäffer 2011). It therefore seems timely to explore the implications of Education Governance on adult education research, also in an international-comparative perspective, since there are hardly any studies comparing the regulation of the adult education sector.

The contribution starts out by analyzing the historic development of the regulation of the adult education sector (in Germany) as well as the dominant accompanying research perspectives. This part will also cover the more recent studies and findings within the debate. In a second step, a model will be presented that can serve as a basis to structure the plurality of adult education providers and as such serve as a basis for identifying organizations in different countries which could be compared in view of their regulation. The third chapter will then introduce and discuss the basic principles of the educational governance perspective, particularly focusing on the concept of governance regimes.

Finally, a draft of an international comparative research program will be
developed which outlines how the analysis of governance regimes can be carried out and what results can be expected from such an analysis.

2 Concepts of regulation and research in regulation of adult education

Taking a look at the regulation of adult education in Germany, it can be stated that its origins lie in the phase of educational reform in the late 1960s. This phase was dominated by an optimistic view regarding the state’s capacity to structure and regulate the educational system. Referring to the “Strukturplan für das Bildungswesen des Deutschen Bildungsrates”, one of the key programmatic documents in Germany of that time, the unity of the educational system was the core goal of the reform. As such, two dimensions were of importance.

On the one hand, the unity of school education, vocational training, university education and adult education was a fundamental guiding principle. The document stated deficient forms of cooperation and called for a closer coordination of school, tertiary and adult education provision. By interleaving the segments of the educational system, transitions between the segments were thought to be made easier. Thus, educational careers could be corrected in the sense of social justice.

On the other hand, the expansion and integration of the adult education sector as an autonomous part of the educational system was a key objective with the school system serving as the main reference model. This goal was based on the analysis that the developed organizational structure of adult education resulted in various confusing, non-coordinated, fragmentary, and partly contradicting activities (see Keim, Olbrich/Siebert 1973, 111). Part of the problem was thought to be identified in the fact that he manifold tasks adult education had to fulfill were carried out by providers of different social and ideological backgrounds.

The state was seen as the central actor in the expansion and integration of the adult education sector. Expansion and coordination of the adult education system were seen as a public task, the state was to take responsibility. Central media of regulation were power and money, i.e. next to legal provision, huge amounts of money were provided for building organizations and for co-funding already existing profit and non-profit adult education providers.

In the late 1970s, some authors, obviously carried by this optimism, proclaimed the successful integration of the organizational structure of adult education into the educational system as well as the structural convergence of adult education to the public school system (see Lenhart/Hamburger 1977).

However, when taking a closer look it has to be pointed out that the expansion of the adult education system according to the reference model came to a halt. One central reason for this can be seen in the budget crisis of the state in the mid 1970s which resulted in massive cuts of public spending for adult education. Nevertheless, the adult education sector expanded during the 1980s and 1990s, albeit distancing itself more and more from the planning vision of the 1970s and the original reference model of the public school system. The expansion took place in the field of new social movements and vocational training.

This phase of the 1990s can be understood as ideal-typical for a linear idea of governance. The state is seen as the central actor, legal and financial provisions were the central media, and building up a public system of adult education was the goal (see Schrader 2011, 38). Furthermore, also the research of regulation was guided by this perspective. Studies focused on the goals and media, especially the efficiency of the legal provision (see Kuhlenkamp 1983; Kuhlenkamp 2003; Kuhlenkamp 2007).

With the political change at the beginning of the 1980s, the adult education policy changed in a dramatic way as well. The market principle came to the fore. The so called Propositions for Adult Education (“Thesen zur Weiterbildung”) made this very clear by stating as follows: „Zielvorstellung der nachfolgenden Thesen ist ein offener Weiterbildungsmarkt mit einem vielfältigen Angebot, das sich im Wettbewerb bewähren muß und rasch auf neue Anforderungen und eine veränderte Nachfrage reagiert. Gestaltungsfreiheit und Raum für vielfältige Initiativen sind dafür der beste Garant. Staatliche Planung und Lenkung oder ein staatlich koordiniertes Weiterbildungssystem, bei dem sich die einzelnen Angebote als genormte Bestandteile in einem vorgegebenen Rahmen vorstellen müssen, lehnt die Bundesregierung ab“ (Knoll 1988, 22). This market principle was prolonged through the 1990s, the legal provisions were not changed.

Regarding research, the perspective of the state as the central actor of regulation remained dominant. This can be seen in the so-called state-studies (see Nuissl/Schlutz 2001) which were carried out during the 1990s and which focused on the question of how far the state accepted its responsibility for public adult education. Quite often, the reports identified a deficit of both the capacity as well as the willingness of the state to support adult education (see Schrader 2008, 33).

This strand of research was continued during the 2000s. As examples, the evaluation of the efficiency of the adult education legislation in the state of Hesse (see Sozialforschungsstelle Dortmund (sfs) 2005) or in Northrhine-Westfalia (see Landesinstitut für Qualifizierung 2004) can be pointed out as well as the evaluation of the efficiency of adult education funding in Northrhine Westfalia in 2011 (see Deutsches Institut für Erwachsenenbildung (DIE) 2011).

However, there are also new impulses in research on the regulation of adult education which go beyond the classical perspective of the state as the key actor and which can be classified along the different levels of the social system of adult education. On the macro-level, studies can be highlighted which focus on the regulative potential of inter- and supranational organizations. (see Jakobi 2009; Ioannidou 2010; Schemmann 2007). Findings show that there is a
convergence of political programs in education between inter- and supranational organizations and the member states. This process of harmonization culminates in the political agenda of lifelong learning. What is more, instruments of regulation (hard and soft law) were identified. Next to the classical instrument of money, the importance of the medium knowledge was unveiled. One central vehicle for this medium is the elaborated structure of educational monitoring.

On the level of organizations, there was also an immense increase in insight. Studies particularly focused on the consequences of the introduction of quality management systems and showed how these systems increased the potential of self-regulation within organizations (see Hartz 2011). A second strand of this debate discusses and analyses how organizations of adult education develop into learning organizations and thus manage to adjust to changing expectations of the environment in a much quicker way (see Feld 2007; Dollhausen/Feld/Seitter 2010).

Next to the above mentioned findings, there are also conceptual contributions such as Schrader’s model of adult education as a multi-level system (see Schrader 2008). Taking the differentiation between interaction, organization, and system from system theory as a starting point, Schrader presents a model with five levels. At the centre, the level of teaching and learning processes can be found, characterized by the categories provision, usage and impact. The next levels are the organization followed by the direct environment of the organization. Finally the levels of national and international educational policy are to be found (see chart 1).

Chart 1: Multilevel-system Adult Education (Schrader 2011, 103)

Summing up, it can be stated that the research perspective on the regulation of adult education was extended considerably during the last years. In the German discourse it was liberated from the focus on the state as the central actor of regulation by considering other actors and different instruments of regulation as well as their impacts on the different levels of the social system adult education.

3 Structure of formal adult education organizations

Looking at adult education providers, it has become clear that there is no systematic structure within the field. One of the central organizational principles is rather that adult education is structured in a plural way. In this sense, adult education represents an antagonistic model to the school system. As a consequence, there is a huge variety of providers which is difficult to capture in a model. Even though several models have been presented especially in the German context (see Arnold 2006, 95ff.; Schrader 2010) they all lack a theoretical foundation and do not allow for a clear differentiation. The unsolved problems of structuring the field also exacerbate an international-comparative provider research, as can be seen with the project of the National Institute of Adult Continuing Education (see Matinal Institute of Adult Continuing Education (NIACE) 2006).

Recently, Schrader provided a model which draws on modernization theory and Neo-Institutionalism and offers the differentiation of four so-called contexts of reproduction, namely “communities”, “state”, “companies”, and “market” (see Schrader 2010).

Initially, Schrader asks the following question: Under which circumstances do organizations reproduce themselves thus securing their existence after they have been founded? Regardless of the reasons organizations are founded, as soon as they exist they cost money (see Luhmann 2000, 405). But money is not the only requirement for a continuing existence. The neo-institutional strand of research emphasizes that organizations are maneuvered in a double structure of technical and symbolic contexts and therefore not only need resources but legitimation as well (Meyer/Rowan 1977). How can organizations ensure that they are permanently granted both?

A general answer could be to join in their environmental institutions. Organizations are a trait of modern societies. Social modernization theories (e.g. Parsons 1977) emphasize the individual being liberated out of traditional commitments and stress their right to inclusion in law and economy of a free and equal society, a society based on democratic principles agreed upon by citizens and market participants. The state (or the public) is a general representative and besides having to secure the framework necessary to realize private interests also is responsible for securing (historically variable) collective goods (e.g. education). A complete privatization would threaten to neglect this (see Meyer 2005). Fundamentally, the falling apart of generalities and particularities, of
public and private, also characterizes the form and legitimation of the exchange of goods and services which in modern societies are predominantly, yet not exclusively, realized by organizations. This exchange (between state and society or within society) underlies a civil society of “free” subjects. It is not founded primarily on power, (traditional and charismatic) domination or commitment, but rather on arrangements. Under equal conditions, these arrangements are forms of contracts, under hierarchal conditions they are forms of orders. The contract applies to a voluntary and mutual declaration of intentions of two basically equal contracting parties. It is a way to layout personal and economic relations, a declaration of intentions that results from offers and requests. The (written or oral documented) order implies instructional authority. Due to this, the assigned person can be obliged to deliver the service. The members of modern society are (as well as organizations and states) principally free to engage and form contracts.

The exchange of services yet also depends – at least when it occurs in assistance with organizations – on an appropriate legitimation. With the term legitimation the difference to legality is underlined, which means the organizations have to ensure the worthiness and acknowledgement of their purpose. With state and society falling apart, two fundamental socially institutionalized legitimation possibilities persist: Organizations can appoint their contribution for the exchange of goods and services to public interests obliged to the common good or towards private and particular interests. Thereby, the basic forms of the exchange of services and its legitimation, which are essential for the reproduction of organizations in all areas of modern society, are named. With the help of this distinction, different institutional environments of adult education can be accessed. If the suggested dimensions (purchase of resources and legitimation) are linked with each other and the characteristics (contract versus order, public versus private interests) are set as an endpoint of continuous, independent scales, one receives a coordinate system containing four fields. This coordinate system identifies the operating space within which the reproduction of organizations can take place. They can be interpreted as institutional fields or contexts of reproduction in which different material and symbolic institutions are available that allow organizations to affiliate in order to secure their existence. The specific connection of institutional patterns of resource purchase, contracts or orders, as well as the procurement of legitimation by indicating their either public or private interest characterize the reproduction contexts of the communities (of shared values and interest), of the state, this firms, and the market. These contexts are arranged below each other but without a hierarchal relation. In the context of the communities, organizations reproduce themselves via contracts and by indicating their public interest, in the context of the state this reproduction occurs when orders are issued to fulfill public interests. If the orders are positioned in the context of firms, orders to fulfill private interests have priority. In the context of the market, purchase of resources by contracts and by appointing their private interests are foregrounded.

Chart 2: Contexts of Reproduction in Adult Education (Schrader 2011, 116)

Organizations of public interests which received contracts are located in the field of communities of shared interests and values. Associated to this field are, i.e., environmental or women’s organizations, political and religious communities, organizations that offer their adult education opportunities to the (potentially) interested broad public. In the context of communities, the second group is comprised of adult education organizations connected to business associations that are based on voluntary or also forced memberships. These guilds and associations that follow the interests of their particular occupational group address a select circle of participants. Organizations within this context secure their legitimation through the reference to public interests. They can be differentiated further in how strong they are state-run or how strongly and distinctly their corporative self-administration is developed.

The second reproduction context is formed by state or the public field. In this context, adult education centers are to be found as well as publicly and legally acknowledged providers of adult education organized around large
institutions like churches or labor unions. These are based on laws of adult and further education, fulfilling a public educational mandate and addressing a broad group of people.

In the third reproduction context, the field of firms is based on private interests and orders. Further education departments, operating within the corporation and addressing a selected group of people (the members of the corporation), are a part of this field. A second group is formed by organizations founded by firms. They also primarily provide occupational further education opportunities, but address an open group of people (the members of several corporations).

The fourth and last reproduction context is the field of the market based on contracts and private interest. Commercial organizations of further education implementing measures of vocational re-education or continuing training as well as private training and consulting institutes offering occupational further education for qualified and executive employees (institutional contract partners and select addressees) are to be found here. Also, language or IT training institutes that address privately interested people (people or contract partners and open groups of addressees) belong to this field.

In a study re-analyzing data on adult education providers in a region of Hesse (n=274), we tested Schrader’s model empirically and managed to show that it can be maintained (see Schemmann/Herbrechter 2010).

However, assuming that this model could serve to classify adult education providers internationally, it does not provide a tool for examining how regulation can be analyzed and understood within the reproduction contexts. Therefore, we introduce the Educational Governance perspective and the concept of governance regimes.

4 Governance-Regime and Governance-Equalizer

The publication titled “Educational Governance” (see Altrichter/Brüsemeister/Wissinger 2007) established the perspective by the same name in Germany. It found particular resonance in the research of school education, but was not widely received in adult education. The Educational Governance perspective seems to be a particularly useful perspective since it acknowledges new patterns of order within society and politics. It does so by ceasing to regard the state as the solitary central actor. Rather, new forces such as market and society-oriented ones are taken into account as well (see Kussau/Brüsemeister 2007, 15). The main goal is to analyze forms of regulation between state, society, and market, particularly focusing on the collaboration of actors with their scopes and resources. The general analytical question is how the balancing of action works within a multilevel system of various actors (see Kussau/Brüsemeister 2007, 16). Points of reference for the analysis are institutions, fields of action, and social systems.

One of the ultimate goals of governance research is the analysis of governance regimes, i.e., to identify relevant governance mechanisms within a constellation of actors (see Lange/Schimank 2004, 23). On a middle level of abstraction, the shaping principles and patterns of coordination of action become apparent. What is more, governance research plots how the coordination of action is built and transformed by specific relationships between actors within a specific social system. Such governance regimes have to be selective when identifying the particularly important principles of coordination and they are contextualized, i.e. they cannot be transferred to other parts of society (see Altrichter/Heinrich/Soukup-Altrichter 2011, 41).

As an analytical concept for Governance-Regimes, Schimank, referring to the work of Clark, developed the so-called Governance-Equalizer. For the particular case of universities five dimensions were developed:
- „regulation of universities by the state,
- External regulation of universities by the state or by other actors which were granted power,
- Academic self-organization of universities,
- Hierarchical self-organization of universities and
- Competition in and between universities” (Schimank, 238).

The separate dimensions are seen as faders which can be regulated up or down and when taken together give the overall picture of coordination of action.

5 Empirical Analysis of governance regimes in Adult education in a comparative perspective

An empirical analysis of governance regimes in adult education in an international comparative perspective could thus be sketched as follows:
1. In a first step representative organizations of the reproduction context “state” need to be identified in the respective countries. This reproduction context is chosen for the study since the governance equalizer which is developed in the context of university education can be adapted to this context. In this stage of the research project three to five case studies per country need to be carried out.
2. Following an analysis of legislation texts, self-descriptions of organizations and statutes by method of document analysis has to be carried out to identify central actors and to start tracing modes of coordination of action between them.
3. After that it is essential to interview the actors that were identified by the document analysis in order to double-check and justify the selection of actors and also trace the modes of coordination.
4. After that the actors that came up as relevant in the interviews need to be analyzed and integrated into the design.
5. Following the identified modes of coordination of action need to be assigned
to the five dimensions of the Governance Equalizer. The dimensions will be operationalized in that way.

6. The development of a questionnaire covering the dimensions and the analysis of the data will follow in order to get an overview of the respective Governance regimes in the reproduction field “state” of the participating countries.

7. At the end the Regimes will be compared and explanations for similarities differences will be developed.

**Literature**


Michael Schemmann, Josef Schrader: *The concept of "Governance Regimes*
Bridging Adult Education between East and West: Critical Reflection and Examination of Western Perspectives on Eastern Reality

Introduction

This paper, applying an international and comparative perspective, examines issues and challenges in learning between Eastern and Western adult education teaching and research endeavors. Questions and thoughts are scrutinized to help create a different mindset as alternatives for learning from the “Other” in the globalized world equally, accurately, and more effectively. First, it introduces a context followed by a brief review of relevant literature illuminating the obstacles and barriers for an equal exchange—that is an exchange through which the West might endeavor to listen to and learn from intelligent life beyond its own borders (Milligan, Stanfill, Widyanto, & Zhang 2011). Second, it shares authors’ personal narratives that illustrate lived issues and challenges that invite us to critically ponder and understand. Finally, it concludes with suggestions that may facilitate further deliberations—philosophically, theoretically, and practically. The paper calls for a different mindset for effectively bridging educational understandings between East and West.

Contexts

In the globalized world, the need for learning from one another about the strengths and limitations of different theoretical and methodological approaches to the study of education, and adult education in particular, has become greater than ever. Many countries have encountered similar changes and challenges brought by globalization. Education has been seen as an effective instrument and given the responsibility by many countries for training people to meet the needs and demands of globalization in various arenas. Education leaders and policy-makers of numerous countries realize that they must quickly acclimatize to such changes in order to maintain their competitive capability, with increasing alignment with the interests of the global market (OECD, 1996).

Seemingly, globalization has created a “world policy or world culture” (Tröhler, 2009), or has transformed the world’s culture into an increasingly standardized phenomenon. Studies show that countries tend not to respond to globalization or meet the needs of the competitive economy in the process (Cheung & Chan, 2010).

Culture is all the knowledge, skills, attitudes, beliefs, values and emotions...
that we, as human beings, have added to our biological base. Culture is a social phenomenon; it is what we as a society, or a people, share and which enables us to live as society. (Jarvis, 2006, P. 55)

Confucian culture, which emanates from Confucian philosophy, has evolved the core of traditional Chinese cultural values. It has become the most enduring influence on China and other parts of East Asia, such as South Korea, Japan, Vietnam, Singapore, and Taiwan. These societies, despite having their own unique identities, share common Confucian cultural values: social emphases of harmony and filial piety, respect for the elderly, moderation, collectivism, hierarchical social structures, and family-centeredness (Sun, 2012a). For people who have grown up from in Confucian culture, although they may have moved to and resided in western countries, Confucianism still remains a strong guiding influence, such as socialization, development of gender roles, parental control, and many other aspects originated from Confucian cultural values (Cheung & Chan, 2010).

Due to shared cultural values, countries like China, South Korea, Japan, and Singapore have taken a similar direction when “facing a turning point in the progress of globalization and are urged to adapt to a knowledge-based society,” and that is “China focuses on ‘character education’ which emphasizes the potential ability to learn; South Korea promotes life-learning ability; Singapore encourages self-learning; and Japan values self-motivated learners and thinkers” (Shimbo, 2009, p. 118).

Cheung and Chan (2010) summarized fours aspects that Sanchez (2003) suggested regarding how education should help learners to become so they would be more competent working in a competitive global world: To successfully enter a knowledge-based environment (i.e. knowledge society), learners need to (a). become information literate and able to make good use of knowledge; (b). Be multilingual so that they can interact more effectively in global communications; (c). Be trained and equipped with high skills in the area of new technologies that keep coming into workplaces; and (d). As the world has become smaller and contact among people around the world has increased, learners must ably work with others both inside and outside the workplace.

These suggestions clearly call for an amplification of the demands from adult education within one’s own educational system, but they also call for conscious and active learning from different paradigms, such as an Eastern perspective where knowledge (what is knowledge and how is knowledge formed) may be perceived differently (Sun, 2008, 2012a), and from different languages where thinking styles and expressions differ from Westerners (Sofo, 2005). Hence the need, as addressed by Dusza (2002), for “communicative competence,” or the mutual negotiation of meaning become essential.

Contrarily, our educational reality presents us with another picture, where Western theories and models have disproportionately been promoted and advocated as the template for understanding and developing education globally (Nguyen, Elliott, Terlouw & Pilot, 2009). This echoes what Fox (2007) observed that “the complex process of intercultural interactions has been analyzed by Western educators as a one-way adaptation and integration of the Other into the dominant educational norm” (p. 118).

Issues and Challenges

Comparative and international education has historically performed significant roles that may be considered to be “the first global academic and practitioner-oriented field” (Wilson, 2003, p. 15). It enabled people to learn and borrow from others to help improve one’s education system and practice or avoid making similar mistakes. Evidently, from the travelers’ tales that described aspects of education from other countries people had visited to the more evolved comparative education methods that facilitated the borrowing and adaptation of education practices and structure, we have witnessed the development of national education policies and practices worldwide (Hayhoe & Mundy, 2008; Kubow & Fossum, 2007).

Hitherto, Tröhler (2009) contends, “there is a history of globalization leading to a more or less homogenous world of education” (p. 41). Globalization currently presents its relationship to education in a new model called “sociological new-institutionalism” and through its concept of “world policy” or “world culture” (Tröhler, 2009). They form another type of educational hegemony, as educational neocolonialism, where Western paradigms tend to shape and influence educational systems and thinking elsewhere (Nguyen, et al., 2009). Milligan et al., (2011) point out homogenizing forces like the international agencies of the World Back and UNESCO too facilitate “the dissemination of Western educational ideals and organizational frameworks through educational development projects.” In fact, “for a long time the concept of ‘development’ was applied primarily to the so-called Third World states in order to outline their duties toward the First World” (Tröhler, 2009, p. 33). As depicted by Fox (2007), “Educational research, as well as educational planning, in ‘developing world’ settings tended to be dictated by European (Western) perceptions of what was good for the Other” (p. 118). Unfortunately, the important aspect of culture, which refers to all aspects of life, including the mental, social, linguistic, and physical forms of culture, has often been overlooked (Masemann, 2007).

As a result, “by adopting western theories and practice wholesale, and applying these in the classroom without rigorous research and consideration, the potential contribution of Asian education researchers has been largely bypassed or discounted” (Nguyen, et al. 2009, p. 110). Consequently, western models have strongly influenced education in terms of what to teach, why to teach it, and even how to teach it at local and international levels, all of which contribute
to the increasing issues and challenges when learning from the Other (Kubow & Fossum, 2007). The field of adult education is no exception, where:

Learning and adult learning has been shaped by what counts as knowledge in a Western paradigm. Embedded in this perspective are the cultural values of privileging the individual learner over the collective, and promoting autonomy and independence of thought and action over community and interdependence. In adult learning theory, andragogy, self-directed learning and much of the literature on transformational learning position self-direction, independence, rational discourse, and reflective thought as pinnacles of adult learning. (Merriam & Associates, 2007, pp. 1-2)

“Independence, separation, and hierarchies characterize a Western perspective, a view in direct contrast to most non-western worldviews” (Merriam & Associates, 2007, p. 3). In Confucian perspective, for example, human beings are social beings and thus human relatedness is the primary given. People learn from one another as they interact with each other. Confucian values view harmony among human beings as necessary to achieve a harmonious society” (Sun, 2012a). Differences are obvious.

The following examples are personal narratives that present some lived issues and challenges in cultural differences between East and West and the unequal flow of learning from the “west to the rest.” We hope they help deepen understanding and broaden visions for our roles as international educators. Questions we raise and discuss call for collaborative efforts toward alternative ways of bridging learning between East and West.

Experience from being a Person of No Culture to a Person of More Cultures

Qi: I am Chinese. Sixteen years ago, I came to the US to pursue my doctorate degree in adult and continuing education. I earned my Master’s degree in Comparative and International Education from China and worked as an administrator of the Adult Education Department of the Ministry of Education of China. This position provided me opportunities for working with Chinese policy makers, researchers and practitioners in the field of adult education, and with experts and scholars from UNESCO, UNFPA, ICAE, DVV etc. I thought I was well prepared to live and study in a western culture. I was not much better off than most East Asian students, sharing similar experiences and treatment (Sun, 2012b). The language issue was not huge for me, as I could understand most of what was said. Sometimes I did not fully understand the meaning due to my lack of background or contexts. At times, I was not understood correctly by others from my cultural perspective. The Chinese way of thinking, which is more circular and indirect as compared to westerner’s linear and direct thinking, clearly contributed to these misunderstandings in addition to language proficiency.

In classroom learning, the Confucian culture that values harmony and emphasizes social hierarchy has shaped me to accept, rather than question, knowledge, especially where such challenges might cause loss of face. Further, it is shameful for students to say in front of the class that they do not understand the teachers’ instructions and assignments (Sun, 2012b). Like most East Asian students, I was quiet and attentively listening to my instructors and peers most of the time. Another reason I kept quiet was that I did not feel my perspective was valued. When there was time when I could contribute I offered my opinion, but instead of receiving some feedback or appreciation like my American peers received, my ways of seeing things seemed uncounted or ignored. Confucian culture, which looks inward and seeks self-reflection for what one’s person is lacking and for self-improvement, led me to always believe these misunderstandings or overlooked matters must be my own incapability in not meeting the criteria or showing the value of my message. I would not ask for an explanation, but internalized the experiences. These experiences led to other issues to deal with as an international student.

In the “rest learning from the west” mode (Nguyen, et al., 2009), I felt my culture/country was less developed especially economically. Western ways led everything, thus everything here in the US was good. (In many ways, this is true, and I have really enjoyed living here.) I naively believed that I was in an inferior position and consistently advanced my knowledge and skills hoping I could think and act like an American. I studied western philosophies, educational theories and practices, and cultural aspects too. Occasionally, with people who happened to be interested in my culture, language, or even food, I would be overjoyed and tried to exchange ideas and cultural learning, only to find an unequal reciprocity. Presumptions play a great role in inaccurate learning and understanding. Subconsciously, westerners living in a “superior” position influence what is valued and or how they even want to pay attention to the “rest” perspectives. The attitude that “you came here to learn from us” consciously (for some) and unconsciously (for others) reminded me that I have no alternative but to learn to think and act like Americans. As years went by, my experience remained as stated in the literature, that it is impossible for me to be an American.

I am not American because no Americans ever considered me one of them—“oh you are from China!” But am I still Chinese? I went back to visit my relatives in China, they felt that I was no longer Chinese. They called me “American Chinese.” I felt lost. I did not know who I was: I had no identity. I started to question myself and suffered the pain inside. What was the value of me? Who have I become—a person of no culture?

Many years passed by with constant critical reflecting and seeking, I started to realize my own culture’s merits—that is over 5,000 years of historical traditions, which have shaped who I have been and who I am. However, for years I looked only toward the western ways and ignored the East, which is of...
equal value and has valid knowledge to offer. I did not pay attention to studying, particularly the Confucian culture, the culture that has influenced my ways of thinking, living and socializing. This realization profoundly inspired me. I began to learn and compare China/East with America/West. Eventually I conducted my doctoral dissertation research on Confucianism for modern theories and practices in adult and continuing education. I continue to learn from the West and introduce the West to my colleagues in the East, but then consciously to use my specialty and expertise to introduce the East to my western colleagues via publications, teaching, and speech. I became an ambassador. I am no longer in an inferior position, and I do not think the West should feel their position is superior either, as both East and West have a great deal to offer to the world. I found a new dimension of my identity - I am a scholar of more cultures! I see my value of being able to help bridge East with West with two cultures.

As I began to teach and research as a faculty member in an adult and continuing education program at an American university, I started to offer courses that deliberately introduced Eastern perspectives and shared my Eastern research with western learners and colleagues. Yet I see the melee continues. I am still often misunderstood due to the eagerness of some to use western assumptions and/or lenses to interpret or change my perspectives or descriptions. They may not be solely responsible for these situations because that is what they have been introduced to from the majority of our courses offered, texts used and literature valued. My deep concern is that we are lacking a place, “the third place” (Liddicoat & Crozet, 2000), for both sides to maintain identities and a sense of belonging while negotiating meaning during the cultural conversation. I long for “authentic communication” (Fox, 2007) that helps create our own intercultural space that facilitates bridge deep chasm of discursive difference. Further, I found that most westerns have limited knowledge, interest, patience, maybe time too, to want to engage learning from the “rest.” It is within such a context that I see my roles as an international educator and comparative education researcher to be crucial, and I know only when we all start from our lived experiences within local and indigenous communities the globe over. I mourn the fact that our thinking is limited to one language. Ideas, philosophies, and indigenous knowledges are taken, reconceptualized, and recast into Western language and terms for further consumption, instead of being acknowledged and honored in their own right. I wonder what we are missing. For anyone who does not belong to the intellectual privileged elite, and for those who reside somewhere in the borderlands of this academic “community” of privilege, it is unmistakably obvious that ideas and “findings” need to be (re)packaged to the expectations and guidelines established by the intellectual privileged few. I see my non-western students and colleagues being actively marginalized. These are merely a few examples of how Western academic conventions, that are put into place for system of beliefs and practices (i.e., an ideology) embedded in institutions and conventions of everyday lives that legitimizes the power of one racial group and justifies its viewing all others as inherently inferior” (p. 206). It is fair to say that intellectual privilege is exercised globally within academe: Western and “scientific” thought is privileged over the thought and scholarship of Other cultures. This intellectual privilege is the ideological effect (Balkin, 1998) of systemic racism, sexism, classism, (post/ne) colonialism, and the whole host of other –isms that accompany these. An ideological effect is when cultural institutions and conventions help create and sustain unjust social conditions, where ideology is an effect produced by cultural and social scripts when they are placed in particular contexts and situations. Thus, ideological effects are the products of symbolic forms and systems that create and sustain relations of domination and injustice within different social contexts. To wit, when we think of ideology in terms of its effects, it is no longer about the content of the ideology itself and its original intentions, but rather about the results of injustice and domination that are (re)produced. Such an understanding limits us in a normative sense, and we can no longer claim one ideology as superior to another, especially if its effects are social injustice (Balkin, 1998).

This intellectual privilege becomes quite evident when we look at whom we cite and reference from “the literature” in our fields when conducting research, as well as in what we consider to be “legitimate” knowledge for our classrooms (even when it comes to critical and emancipatory education). I struggle with this in developing curriculum. The process of publication dictates how knowledge should be structured, articulated, (re/pre)packaged for distribution, and disseminated, and said knowledge is guarded by the gatekeepers of intellectual privilege. I struggle with this in publishing my research. Quantitative research based on the “gold standards” of experimental design and “proven” best practices are also consistently privileged over perennial wisdoms and the lived experiences within local and indigenous communities the globe over. I struggle with this as a qualitative researcher. Intellectual privilege is manifest in the fact that the (neo) colonial language of English is the predominant language used for research and discourse in academe. I mourn the fact that our thinking is limited to one language. Ideas, philosophies, and indigenous knowledges are taken, reconceptualized, and recast into Western language and terms for further consumption, instead of being acknowledged and honored in their own right. I wonder what we are missing. For anyone who does not belong to the intellectually privileged elite, and for those who reside somewhere in the borderlands of this academic “community” of privilege, it is unmistakably obvious that ideas and “findings” need to be (re)packaged to the expectations and guidelines established by the intellectual privileged few. I see my non-western students and colleagues being actively marginalized. These are merely a few examples of how Western academic conventions, that are put into place for

Personal Experiences in Confronting Western Privilege

Liz: I was hired as a new faculty member because of my “international” and “diverse” perspectives. I have facilitated international and comparative education courses and courses on globalization and international social relations and movements etc. (95% of my student populations are White like me). When I think about the challenges I have experienced in teaching and research on learning between the “East” and “West,” I can sum up in one word: privilege. I will refer to “Western” thought and research as privileged, specifically as intellectual privilege. According to Brookfield and Holst (2011), privilege is “a
a variety of purposes, become the mechanisms and the systems that reproduce western intellectual privilege and its ideological effects continuously.

What is more, our conventional approaches to addressing diversity issues within research and curriculum also become mechanisms of intellectual privilege that produce unacceptable ideological effects. But such a position requires a great deal of explanation, and I will attempt here to summarize what Brookfield and Holst (2011) have addressed as repressive tolerance (Marcuse, 1965) very well in their recent book Radicalizing Learning. As they explain, providing diverse perspectives in curriculum and research in celebration of all views as equal creates the illusion of inclusion and diversity, allowing us to think that we are moving away from White, male, Eurocentric views. However, in creating this illusion of diversity, we unwittingly reinforce dominant ideology and intellectual privilege. The problem is, when we line up all of the different views next to the dominant ideology, it remains the center and seems even more natural and inevitable than before, as all of the Other views are diluted and continue to be seen as alternative views of the “weird minorities.” Brookfield and Holst (2011) further explicate:

Adult educators can soothe their consciences by believing progress is being made toward radical inclusivity and cultural equity and can feel they played their small but important part in the struggle. But as long as these subjugated traditions are considered alongside the dominant ideology, repressive tolerance ensures they will always be subtly marginalized as exotic, quaint, and other than the natural center. (p. 195)

I realize and see how I have participated in this repressive tolerance, and I am stumped. As long as the gamut of perspectives is displayed as a menu of items from which each person “rationally” chooses, the dominant ideology will continue to prevail. Merely presenting different perspectives will not do, as people are predisposed to select the socially sanctioned ideologies, and in presenting diverse perspectives in this way, one is really reinforcing the dominant ideology and its ideological effects. That is not to say that we should not be researching the worlds beyond our limited view, or that we should not include diverse views in curriculum, but more importantly, we (and by “we”, I mean we the White privileged intellectuals who disproportionately benefit from the ideological effects of the dominant ideology) must also work to give up the misconception that we are neutral facilitators, acknowledge our collusion in reproducing and maintaining systems of privilege (i.e. recognize that we too are oppressors), and purposefully develop an uncompromising intolerance for the radical injustices produced by our own ideology. So long as Western ideologies continue to serve as the ruler by which all Others are measured, we are actively reproducing and maintaining systems of privilege (i.e. recognize that we too are oppressors), and purposefully develop an uncompromising intolerance for the radical injustices produced by our own ideology.

In developing “diversity courses” and introducing Eastern ideas to privileged western students, and in conducting comparative international research, I have watched this repressive tolerance unfold time and time again. I experience frustration and struggle in learning how to confront my own privilege, and how to become a true white ally. I often must pull my foot from my mouth. I have learned painful lessons how White privilege saturates my own behavior, discovering my own collusion in the dismissal of students, colleagues, and alternative conceptions of normality. I have also discovered hope in finding people who are dedicated to developing socially responsible and equitable praxis. So the greatest challenge I perceive as an educator and as a comparativist, but most of all as a white, privileged, western academic who works at a privileged research institution in a colonizing country, is the challenge of recognizing and unpacking my own White privilege and my intellectual privilege, and to confront the ideologies (especially my own) that reproduce social injustice. I feel my challenge and role is to learn how to begin building bridges.

Building Bridges: Understanding Challenges

We have briefly reviewed literature, described and discussed our individual experiences and observations of teaching and researching. Despite the fact that we differ culturally, linguistically, and philosophically and more, we find we ask similar questions: how do we as educators in international and comparative adult education, see our roles in changing “West learning from the East/rest? What should we keep in mind while introducing our western learners to realities of the East? What mindset and approaches would help reduce the dangers: that is, the West applying its own philosophical/theoretical orientations; solely using its own language (English); accepting only its own ways of thinking; and believing in its own emphasis on technology use when western learners are introduced to Eastern reality.

We have encountered similar challenges when endeavoring to bridge East with West. The first challenge rests upon the mindset that is shaped by one’s own cultural values and educational traditions. Change is difficult. Fully changing one’s mindset is impossible. However, becoming open, non-judgmental and appreciative of other ways of seeing the world is doable and is a necessity for all learners in the globalized world. Sun (2012b) and Erichsen (2011) have studied transformative learning within the context of international students’ experiences, which all illustrate that “international students must establish what Mezirow (2000) termed a new ‘frame of reference’ and experience changes related to ‘meaning schemes’ (points of view) and ‘meaning perspective’ (habit of mind) in order to renegotiate their identities and roles within the new lifeworld for success” (Sun, 2012b, p. 204). In a similar approach, we hope westerners can pursue parallel learning for transformation, like international students, they will need to develop courage to experience the challenge and alter their previous “frame of reference”.

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The second challenge relates to what counts as knowledge in Western mind and academic literature. Who else should be contributors to the literature? Should literature use multiple languages? Should research methods from different paradigms be counted as equally valid for publication? We should also critically interrogate the criteria and norms to be accepted by these western journals, and how these influence the generation of knowledge. How can we shift from a privileged “western knowledge production line” for the rest, to a process that privileges inclusion? We need to think about what is considered as knowledge, from whose perspectives, and for what purposes? Questions along these lines should consistently be asked and revisited so that they continue to challenge our present mindset and change the current circumstances in which the “Western” model presides as the gold standard and is used to measure non-western realities and views that have emerged autonomously from Western norms (Merriam and Associates, 2007). Larson (1988) also acknowledged the dilemma of traditional comparative philosophy in its tendency to view the non-western Other through Western philosophical lenses (as cited in Milligan et al., 2011, p. 51). Particularly when we introduce the East to the West, there is dearth of available literature for references.

The third challenge touches on different ways of “knowing and learning.” People from other parts of the world have different ways of perceiving the world, ways that are equally valid, invaluable, and reflective of their life circumstance (Arnowe, 2007), their learning and education should also be understood within their own cultural models. More importantly, as indicated by Krishna (1988), “no culture or tradition can be assigned a privileged place in this game of observing the other” and that the search for solutions to problems, philosophical or otherwise, requires us “to look at it from both sides” (as cited in Milligan et al., 2011, p. 52). But how many texts/books or journal articles published in the West can you think of that have not applied western theories, norms, conceptions, models, mythologies? We wonder even those that introduce non-western culture and education to certain degree may miss real meaning if from the Other’s perspective, for “the subtleties of linguistic and philosophical dilemmas of translation are often confused with a binary process of substituting one set of meaning for another” (Fox, 2007, p. 118).

The fourth challenge relates to language and communicative competence (Duszak, 2002), and cultural incompatibilities, “a logocentric view that stereotypes the Other and marginalizes those who identity with nondominant cultures” (Fox, 2007, p. 118). Language competence obviously necessitates the need for global learners to become multilingual for effective communication, especially the social part of language and the genuine interaction between people in social context is crucial. People whose native language is English may have advantages for teaching, learning, and researching with partners from the East, but they still need to be conscious from an intercultural “communicative competence” and learn to communicate with non-English native people for “negotiation of meaning.” Lo Bianco et al. (1999) suggests that a new space be created “to negotiate comfortable ‘third places’ between the self and the other/the foreign” (as cited in East, 2008, p. 158). “The ‘third place’ refers to ‘a comfortable unbounded and dynamic space that intercultural communicators create as they interact with each other and in their attempt to bridge the gap between cultural differences” (Liddicoat & Crozet, 2000, p. 1, as cited in East, 2008, p. 158). Similarly, Fox (2007) suggests to create situations in which two people (or two groups) from very different cultures, based on mutual trust and a respectful sharing of intended meanings, can get together and achieve real understanding, which he terms “authentic communicative situation.” Applying these approaches, we potentially equip adult learners with vital skills to engage with the East in a more effective way.

Conclusion and Suggestions

There is a clarion call for bridging learning between East and West in the theory and practice of adult education. To look at both sides means “we must hear both sides, we must be able to listen to the experience of intelligent life expressed in discourses” (Milligan et al., 2011, p. 52) or we may not otherwise recognize when we are carelessly over-applying Western norms and values. Panikker’s dialogical philosophy (1988) is meaningful to this paper:

[W]e forge a common langue, we reach a mutual comprehension, we cross the boundaries. That is what I called dialogical philosophy. It is not the imposition of one philosophy or one mode of understanding, but the forging of a common universe of discourse in the very encounter. (As cited in Milligan et al., 2011, p. 52)

In order to listen and learn from the reality of the East, we believe one’s mindset must be altered so openness and appreciativeness will come into play so we can recognize values we may otherwise miss. Understanding that the East has different philosophical systems, cultural traditions and educational goals also helps us to think from different paradigms and not be so eager to mis-apply Western thought to Eastern realities, though ironically in many ways, the reality of the East mirrors the perspectives of the West, which is really unfortunate as presented earlier in the paper.

Improving language and communicative competency of western learners may help create “the third places” where both Easterners and Westerners’ identification with another and sense of belonging may be increased, and feelings of superiority and privilege or of inferiority and disadvantage may be reduced so that intercultural communication may become more effective.

Dismantling privilege and transforming our mindset lie central in the purposes of adult education and international and comparative research. The strength of research and learning work in the areas of international and
comparative education is that it “challenges us to think broadly about the link between local practices and global issues and to explore the overlapping values and social systems that underpin the educational enterprise itself” (Hayhoe & Mundy, 2008, p. 1).

Creating a third place and situations for authentic communication significantly offer implications to bridge learning equally between East and West as they powerfully help “opening oneself to the full power of what the other is saying”, and “such opening does not entail agreement but rather the to-and-fro play of dialogues” (Fox, 2007, p. 119).

In closing, we want to thoughtfully remind ourselves by sharing a picture of a scholar with an international dimension that Confucius presented to us: Confucius highly respected receiving foreign visitors and visiting other states. Confucius himself visited many states during 14 years of travel (Sun, 2011). Confucius believed that these occasions presented momentous opportunities for exchanging ideas, improvement, and transformation. “Is it not delightful to have friends coming from distance to share and exchange with?” (The Analects of Confucius, 1, 1) (As cited in Sun, 2012b, p. 214).

References

Learning Topics Identified by the Middle-aged Groups: Comparison between Two Groups of Chinese People in Singapore and Taiwan

Abstract

The main purpose of this paper was to investigate learners’ preference for learning theme in terms of reaching vision of active aging. The article utilized a questionnaire survey and asked participants to identify topics that they want to learn. The study first reported a curriculum framework that was constructed by the researcher. Secondly, the study reported results of investigation from two countries respectively. Finally, the study ended with comparisons between two groups in terms of their similarities and differences. The result showed that participants from both countries showed their interest on personal health issues and mental development, and the slight variation reflected the cultural differences.

Key words: Learning themes for later life, learning to be active aging, learning for later life program

1. Introduction

Demographic aging has been a growing global phenomenon in most well developed countries. The world at large has been experiencing a significant shift towards increasing numbers of people living what Peter Laselett (1989) called “the third age”. Lifelong learning has been important for the government policy. It was widely accepted that people will need to continually update and learn new skills in order to remain competitive in the changing society. It was suggested that people in their later life who are involved in learning advantage in terms of their own health and well-being will live a more active life and become more involved in their community. However, older adults’ involvement in adult education has not been compatible to the percentage of the population. Factors affected participation may be various such as ageism that viewed older learners lack of learning capability and there are only few professionally trained people who are capable of planning and designing senior citizens learning courses.
Consequently, programs provide for the older people are seldom based on theories and with clear goals.

In response to the aging population, we need to create a more innovative and interesting way of teaching the courses, so that the seniors could understand and absorb the content more easily and efficiently. As a result, it is important to focus on senior education research topics including interesting program design and teaching method etc.

This article is part of the aforementioned elderly educational research issues. The main purpose of this paper was to investigate learners’ preference of learning theme. The article compared two middle-aged groups from Singapore and Taiwan who revealed topics that they want to learn in terms of active aging. The study first reported a curriculum framework that was constructed by the researcher and the idea was derived from active aging concept advocacy by World Health Organization (WHO) in 2002 and also based on Howard McClusky’s theory in 1971. Secondly, the study reported results of investigation from two countries respectively. Finally, the study compared results revealed by two groups in terms of their similarities and differences and recommendations were provided for practitioners and policy makers.

1.1 Active aging policy framework and implication

Because of population aging, some questions were raised and concerned by the policy-makers. Those questions include how to help the aged people to remain independent and active, and how to improve quality of life for people who are getting older? The health care and social security systems are other frequently discussed issues.

The proportion of people age 60 and over is growing faster than any other age groups in all countries, especially in developing countries. WHO declared that if we need to create a positive view of aging society, we must emphasize the importance of seniors’ health issues, seniors’ participation in community events, and senior’s domestic and public safety. WHO has adopted the term “active ageing” to express the process for achieving that vision. Active ageing was defined by WHO as:

- the process of optimizing opportunities for health, participation and security in order to enhance quality of life as people age (WHO, 2002, p.12).

Active ageing depends on a variety of factors or indicators that surround individuals, families and nations. Those factors include gender, culture, health, social service systems, individual behavior, personal factors, physical environment indicators and social environment factors and economic determinants.

Today population aging has been a global phenomenon that demands international and national endeavor to do system planning. Failure to deal with those questions will have socioeconomic consequences. Guided by the United Nations Principles for Older People, the policy framework for active aging was developed by WHO. These principles are independence, participation, care, self-fulfillment and dignity. WHO proposed three basic pillars that guided the policy framework into action. This conceptual diagram also revealed that many critical topics behind each pillar are essential for learning in the later life but they have been missing in the current programs. Education programs for the older adult may be developed based on the implication of the Policy framework.

1.2 Curriculum framework

In this article, we first constructed a curriculum framework and developed a checklist type survey tool to investigate two groups of Chinese people from Singapore and Taiwan. The theoretical basis of this framework included two sources.

First, the concept of “Active Aging”, developed by WHO in 2002, was a policy framework of an aging society which aimed to enhance the quality of senior’s life and to achieve the goals of active aging through learning. This research used the idea of active aging as the pivot to build the course structure. According to this structure, the vision of senior education is to help the elders to reach the vision of “active aging”; furthermore, the goal of senior education is to stir a realization among the elders and eventually to motivate them to continue learning. The education program regarding active aging mainly consists of five dimensions: safety, health, spiritual growth, social interaction and contribution or service; each having different learning topics.

The White House Conference on Aging (WHCoA) is a once-a-decade conference sponsored by the Executive Office of the President of the United States which makes policy recommendations to the president and Congress regarding to the aging society. The original goal of the conference was "to provide a forum for representatives of older Americans throughout the country to discuss and propose solutions to the unique problems facing the elderly in this country. The first conference held in 1961 and the recent one was held in 2005. The White House Conference on Aging held in 2005 was named "The Booming Dynamics of Aging: From Awareness to Action" and attracted one thousand two hundred delegates from across the country.

Horward McClusky, a retired Professor of University of Michigan, began making his main contributions to educational gerontology when he was asked to co-chair the Section on Aging for the 1971 White House Conference on Aging. The paper entitled the educational background issues that Howard authored (1971) and the conference that he held had become cornerstones for much of the subsequent thinking on the potential aging education. In his paper, he proposed a theory of margin that was defined as follows:
Margin is a function of the relationship of load to power. By load we mean the self and social demands required by a person to maintain a minimal level of autonomy. By power we mean the resources, i.e., abilities, possessions, position, allies, etc., which a person can command in coping with load.

(McClosky, 1970, p. 27)

Howard McClusky’s work in preparation for the 1971 White House Conference on Aging apparently was based on his reflection, synthesizing from his earlier publications and fresh ideas. He had the foresight to propose that 45 years old was the appropriate age to learn for the later life. In addition, a significant contribution was how he thought about the age-related needs according to the theory of margin. He introduced to scholars and planners to consider five distinct categories of need:

- **Coping needs**—minimal literacy and self-sufficiency levels; if they are not met a surplus of power to meet higher needs is absent.
- **Expressive needs**—activity carried out for its own sake; time is usually required by each person for some expressive activity.
- **Contributive needs**—altruistic desire to serve others; surplus margin is utilized outside of "self" or coping requirements.
- **Influence needs**—desire for political skill and wisdom; surplus energy and resources may go to improving related skills.
- **Transcendence need**—rising above age-related limitations; learning to balance power and load.

Several scholars had used the five-part frameworks in their research and program design. On the basis of Policy Framework provided by WHO and McClusky’s theory, the objective for learning in later life has been obvious.

### 2. The curriculum framework

Applying the concept of active aging and the five layers of needs, our research constructed a curriculum framework including 5 learning dimensions and 27 learning topics as Figure 1.
The framework is holistic and appropriate for program planners who are subject to planning educational programs for the middle-aged learners.

3. Method

3.1 Participants and Procedure

Two indicators were used to select the participant. One was age and the individuals who were at least 45 years old were qualified to join the study. Another indicator was yearly hours of participation in learning. Participants of the study were selected from Southern Taiwan and Singapore. They were recruited mainly from two learning programs. For the Singapore group, the program coordinator of YA! Community College invited and selected qualified participants. After the consent of the CEO of this College, the program director reviewed their learners’ list, first singled out qualified people and then she called each participant to explain the study purposes and distributed questionnaires to people who expressed willingness to participate. For the Taiwan group, the participants were recruited from learning for later life program organized by the Institute of Educational Gerontology of a University. Registered participants were obligated to fill out survey regarding to the courses and satisfaction. For their convenience, participants could return the surveys to any of the instructors.

A total of 80 out of 95 individuals returned and thus the response rate was 84%. There were 50 females and 30 males ranging from age 45 to 75 year-old. Among the group of participants, 40% were Chinese living in Taiwan, 60% were Chinese living in Singapore. With regards to educational status, 15% complete high school, 56.25% not completed high school, 11.25% had technical qualifications, 11.25% had an undergraduate university degree, and 6% had graduate degree.

3.2 Instrument

The questionnaire was consisted of 5 dimensions and 27 topics based on the framework described above with the Cronbach α equal to 0.948. Participants were requested to indicate ten preferences topics they would like to learn. In order to avoid the tiredness in responding to the survey, we decided to let the participants to identify their preferences 10 learning themes out of the 27 items.

4. Results & discussion

4.1 Background of the respondents

Total of the questionnaires returned was 80; the background of respondents was as the following:

<table>
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<th>Sex</th>
<th>Taiwan N</th>
<th>Singapore N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>13(40.6)</td>
<td>17(35.4)</td>
</tr>
<tr>
<td>Female</td>
<td>19(59.4)</td>
<td>31(64.6)</td>
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<tr>
<td>Total</td>
<td>32</td>
<td>48</td>
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</table>

<table>
<thead>
<tr>
<th>Age</th>
<th>Taiwan N</th>
<th>Singapore N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. 45-49</td>
<td>5(15.6)</td>
<td>0(0)</td>
</tr>
<tr>
<td>2. 50-54</td>
<td>6(18.8)</td>
<td>5(10.5)</td>
</tr>
<tr>
<td>3. 55-59</td>
<td>3(9.4)</td>
<td>11(23.1)</td>
</tr>
<tr>
<td>4. 60-64</td>
<td>8(25.0)</td>
<td>18(37.6)</td>
</tr>
<tr>
<td>5. 65-69</td>
<td>6(18.8)</td>
<td>9(18.9)</td>
</tr>
<tr>
<td>6. over 70</td>
<td>4(12.5)</td>
<td>5(10.5)</td>
</tr>
<tr>
<td>Total</td>
<td>32</td>
<td>48</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Education</th>
<th>Taiwan N</th>
<th>Singapore N</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Primary &amp; JH</td>
<td>7(21.9)</td>
<td>38(79.2)</td>
</tr>
<tr>
<td>2. Complete HS</td>
<td>5(15.6)</td>
<td>7(14.6)</td>
</tr>
<tr>
<td>3. College graduate</td>
<td>7(21.9)</td>
<td>2(4.2)</td>
</tr>
<tr>
<td>4. Bachelor Degree</td>
<td>8(25.0)</td>
<td>1(2.1)</td>
</tr>
<tr>
<td>5. Grad School &amp; above</td>
<td>5(15.6)</td>
<td>0(0)</td>
</tr>
<tr>
<td>Total</td>
<td>32</td>
<td>48</td>
</tr>
</tbody>
</table>

The similarities of the two groups included gender and age. The majority of the learners were women; two groups presented the same results. From the perspective of age, 50 to 69-year-old were the major groups involved in learning. From the perspective of educational background, majority of Taiwanese group (78%) had a high school or even higher degree. For the Singaporean group, most of them did not have associate degrees. The two groups were different in terms of their educational background. Participants have relatively high education for Taiwanese group but not Singaporean group. This situation was associated with the different educational systems of the two countries. There are eight local universities in Singapore, while there are more than 100 institutions of higher education in Taiwan.

4.2 Topics identified by participants as their preferences

In order to be active while aging, there are several educational topics suggested. Based on statement of WHO’s policy framework and McClusky’s theories, we proposed a framework as figure 1 for program planners to plan learning activities for their learners. The purpose of this study was to know how the older
adults evaluated those learning topics in terms of their preferences. The study provided a questionnaire that inquired the participants to identify their 10 priority.

4.2.1 Preferred learning topics identified by two groups

People from Taiwan group expressed their preferred learning topics as the following table 2.

<table>
<thead>
<tr>
<th>Order</th>
<th>Learning Topics</th>
<th>Number checked</th>
<th>Order</th>
<th>Learning Topics</th>
<th>Number checked</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>regular exercise</td>
<td>21</td>
<td>6</td>
<td>using technologies and social networks</td>
<td>14</td>
</tr>
<tr>
<td>2</td>
<td>activation of memory</td>
<td>20</td>
<td>7</td>
<td>learning to read</td>
<td>14</td>
</tr>
<tr>
<td>3</td>
<td>excursion</td>
<td>20</td>
<td>8</td>
<td>volunteering</td>
<td>14</td>
</tr>
<tr>
<td>4</td>
<td>explore the meaning of life</td>
<td>19</td>
<td>9</td>
<td>emergency alarm system</td>
<td>14</td>
</tr>
<tr>
<td>5</td>
<td>health knowledge</td>
<td>17</td>
<td>10</td>
<td>understanding common middle-aged illness</td>
<td>14</td>
</tr>
</tbody>
</table>

N=32

Participants from YA! Singapore identified the following ten preferred learning topics (Table 3).

<table>
<thead>
<tr>
<th>Order</th>
<th>Learning Topics</th>
<th>Number checked</th>
<th>Order</th>
<th>Learning Topics</th>
<th>Number checked</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>knowledge on nutrition</td>
<td>37</td>
<td>7</td>
<td>understanding common middle-aged illness</td>
<td>23</td>
</tr>
<tr>
<td>2</td>
<td>health knowledge</td>
<td>36</td>
<td>8</td>
<td>family interaction</td>
<td>23</td>
</tr>
<tr>
<td>3</td>
<td>activation of memory</td>
<td>29</td>
<td>9</td>
<td>learning to read</td>
<td>21</td>
</tr>
<tr>
<td>4</td>
<td>explore the meaning of life</td>
<td>29</td>
<td>10</td>
<td>excursion</td>
<td>21</td>
</tr>
</tbody>
</table>

N=48

A total of seven themes were checked by two groups of people as their preferences which included health knowledge, activation of memory, explore the meaning of life, understanding common middle-aged illness, learning to read, excursion, and using technologies and social networks. Only four out of the ten options were different between two groups. Participants in Taiwan emphasized their interest on regular exercise, volunteering, and emergency alarm system, while participants from Singapore emphasized on the knowledge of nutrition, learning to think positively, drug/medicine safe usage, and family interaction.

It’s interested to find out that different learning preferences reflect different life and cultures. Learning to know nutritional facts, for example, was identified by Singapore participants as their top preference. When we did this study and visited in Singapore, we found that many food courts in Singapore provided a wide range of food choices. Compared the food in Taiwan, we felt that the Singapore food is delicious but the taste was too heavy. In other words, Singapordian food was gresier, salty, and lack of vegetables. In Taiwan, media repeatedly stressed that a healthy diet is critical to our health; as a result, Taiwanese bring their own sake lunch to work instead of eating out every day. From this perspective, we can see the differences caused by the cultures.

Regular exercise was chosen as the first preference by participants from Taiwan. This result is understandable from a cultural perspective too. Researches concerning the elderly participating in learning activities, the research findings showing that learning to do exercise and learning about health were their priority to participate. The above discussions come from empirical observation and not directly from the survey results. It is worth a follow-up and in-depth discussion.

4.2.2 Less priority option identified by both groups

Speaking of the least prioritized preferences, Singapore group thought about five topics that were not as interested, which included belief learning or spiritual learning, gender knowledge, DIY courses, human resource development, and traffic safety.

Four of previous five learning topics such as belief learning, gender knowledge, human resource development, and traffic safety were identified by both Singapore group and Taiwan group as the least prioritized subjects.
Differences were found in two courses, one was taking care of family and relatives, and another one was DIY courses. The former was considered less prioritized by Taiwan group.

4.3 Learning preferences identified by two groups in terms of both dimensions and topics

Overall, learning preferences in terms of dimensions and topics were identified by each group as the following two Tables separately.

<table>
<thead>
<tr>
<th>Learning Dimensions &amp; Topics</th>
<th>Number (N)</th>
<th>Min (I)</th>
<th>Max (X)</th>
<th>Mean (M)</th>
<th>Standard deviation (SD)</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>exercise/ health: health knowledge</td>
<td>48</td>
<td>10</td>
<td>5.17</td>
<td>3.789</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>exercise/ health: knowledge on nutrition</td>
<td>48</td>
<td>10</td>
<td>4.23</td>
<td>3.328</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>spiritual growth: explore the meaning of life</td>
<td>48</td>
<td>10</td>
<td>3.52</td>
<td>3.644</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>spiritual growth: activation of memory</td>
<td>48</td>
<td>10</td>
<td>3.42</td>
<td>3.506</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>spiritual growth: learning to think positively/ positive thinking</td>
<td>48</td>
<td>10</td>
<td>3.42</td>
<td>3.902</td>
<td></td>
<td>5</td>
</tr>
<tr>
<td>exercise/ health: understanding common middle-aged illness</td>
<td>48</td>
<td>10</td>
<td>2.83</td>
<td>3.616</td>
<td></td>
<td>6</td>
</tr>
<tr>
<td>spiritual growth: learning to read</td>
<td>48</td>
<td>10</td>
<td>2.71</td>
<td>3.596</td>
<td></td>
<td>7</td>
</tr>
<tr>
<td>social interaction: using technologies and social networks</td>
<td>48</td>
<td>10</td>
<td>2.54</td>
<td>3.427</td>
<td></td>
<td>8</td>
</tr>
<tr>
<td>living and safety: drug/medication safety</td>
<td>48</td>
<td>10</td>
<td>2.48</td>
<td>3.128</td>
<td></td>
<td>9</td>
</tr>
<tr>
<td>social interaction: family interaction</td>
<td>48</td>
<td>10</td>
<td>2.31</td>
<td>3.325</td>
<td></td>
<td>10</td>
</tr>
<tr>
<td>exercise/ health: conservation of resources</td>
<td>48</td>
<td>10</td>
<td>2.23</td>
<td>3.441</td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>exercise/ health: sleeping quality</td>
<td>48</td>
<td>10</td>
<td>2.13</td>
<td>3.272</td>
<td></td>
<td>12</td>
</tr>
<tr>
<td>social interaction: excursion</td>
<td>48</td>
<td>10</td>
<td>2.02</td>
<td>3.199</td>
<td></td>
<td>13</td>
</tr>
<tr>
<td>contribution service: volunteering</td>
<td>48</td>
<td>10</td>
<td>1.94</td>
<td>3.628</td>
<td></td>
<td>14</td>
</tr>
<tr>
<td>exercise/ health: regular exercise</td>
<td>48</td>
<td>10</td>
<td>1.92</td>
<td>3.494</td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>social interaction: making new friends</td>
<td>48</td>
<td>10</td>
<td>8.73</td>
<td>2.615</td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>living and safety: emergency alarm system</td>
<td>48</td>
<td>10</td>
<td>1.62</td>
<td>3.119</td>
<td></td>
<td>17</td>
</tr>
<tr>
<td>contribution service: taking care of family and relatives</td>
<td>48</td>
<td>10</td>
<td>1.50</td>
<td>2.866</td>
<td></td>
<td>18</td>
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<tr>
<td>social interaction: club activity</td>
<td>48</td>
<td>9</td>
<td>1.46</td>
<td>2.689</td>
<td></td>
<td>19</td>
</tr>
<tr>
<td>living and safety: house safety</td>
<td>48</td>
<td>9</td>
<td>1.40</td>
<td>2.703</td>
<td></td>
<td>20</td>
</tr>
<tr>
<td>living and safety: fraud prevention</td>
<td>48</td>
<td>9</td>
<td>1.37</td>
<td>2.367</td>
<td></td>
<td>21</td>
</tr>
<tr>
<td>spiritual growth: understanding important societal subjects and trend</td>
<td>48</td>
<td>8</td>
<td>1.21</td>
<td>2.526</td>
<td></td>
<td>22</td>
</tr>
<tr>
<td>living and safety: traffic safety</td>
<td>48</td>
<td>10</td>
<td>1.17</td>
<td>2.461</td>
<td></td>
<td>23</td>
</tr>
<tr>
<td>contribution service: develop human resources</td>
<td>48</td>
<td>8</td>
<td>0.71</td>
<td>1.910</td>
<td></td>
<td>24</td>
</tr>
<tr>
<td>contribution service: DIY activities</td>
<td>48</td>
<td>10</td>
<td>6.89</td>
<td>2.223</td>
<td></td>
<td>25</td>
</tr>
<tr>
<td>spiritual growth: religious beliefs</td>
<td>48</td>
<td>10</td>
<td>4.98</td>
<td>1.989</td>
<td></td>
<td>26</td>
</tr>
<tr>
<td>social interaction: gender knowledge</td>
<td>48</td>
<td>6</td>
<td>21</td>
<td>3.967</td>
<td></td>
<td>27</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Learning Dimensions &amp; Topics</th>
<th>Number (N)</th>
<th>Min (I)</th>
<th>Max (X)</th>
<th>Mean (M)</th>
<th>Standard deviation (SD)</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>exercise/ health: regular exercise</td>
<td>32</td>
<td>10</td>
<td>4.78</td>
<td>4.202</td>
<td></td>
<td>1</td>
</tr>
<tr>
<td>spiritual growth: activation of memory</td>
<td>32</td>
<td>10</td>
<td>4.44</td>
<td>4.032</td>
<td></td>
<td>2</td>
</tr>
<tr>
<td>spiritual growth: explore the meaning of life</td>
<td>32</td>
<td>10</td>
<td>3.44</td>
<td>3.991</td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>social interaction: excursion</td>
<td>32</td>
<td>10</td>
<td>3.34</td>
<td>3.366</td>
<td></td>
<td>4</td>
</tr>
<tr>
<td>exercise/ health: health knowledge</td>
<td>32</td>
<td>10</td>
<td>2.75</td>
<td>3.581</td>
<td></td>
<td>5</td>
</tr>
</tbody>
</table>

4.3.1 Similarities and differences

There are more similarities than differences between the two groups in terms of learning dimensions and topics. Two groups of participants considered that, among the ten major options, there were seven learning themes that were significantly important; moreover, other participants also mentioned health and spiritual growth aspects were relatively important as well. Health and spiritual growth aspects were viewed as individual matter. This not only re-emphasizes WHO’s point of “three active aging pillars”, but also reflected what participants considering the most valuable aspects in their learning. This reslut also proved that it was crucial to fulfill one’s personal need first before he or she can actually contribute themselves to the society.

There are three major different perspectives between the participants in Singapore and Taiwan. Participants in Singapore considered the idea of positive thinking, reading, and spending time with family important, while participants in Taiwan focused on exercising, traveling, and emergency drill system. This variation reflected the cultural differences between the countries. For example, Singapore government has already paid careful attention on the drill system, such as having systematic drill and alarm in the Singapore public housing which is currently managed by the Housing and Development Board. Therefore, they did not focus much about the drill system in the course, while Taiwanese...
emphasized it. Cultural difference is probably the cause of different perspectives toward aging learning.

5. Implication

Our research invented an active aging course structure which included five major learning aspect and twenty-seven learning themes. All the content was closely related to middle age adults’ learning process. Our research then selected participants from Singapore and Taiwan to analyze the different perspectives and preferences people would have from different cultural background. The result showed that participants from both countries showed emphasis on personal health issue and mental development, and the slight variation reflected the cultural differences. This is something that will be valuable for us to look deeper into in the further research.

1. Course designers can refer to our research findings and models to develop a better set of course contents that will ultimately enhance our seniors’ living qualities.

2. Our study provided major learning themes to our participants, some of them are not identified as interested as others; however, those topics are essential to fulfill the goals of active aging learning; as a result, the course designers should not ignore any of them due to the lack of interest from the participants.

3. Our study focused on the seniors in two different countries and what were seniors’ preferences toward active aging learning. The result showed that many of the participants ignored some of the important learning themes, such as knowing the differences between genders, religions, and older employments, etc. Course designers can use our findings to enhance the objectives and goal of the active aging learning. Lastly, because heterogeneity of older adults should not be ignored, our further study should include “how to teach” and “how to evaluate” for the learning in later life programs.

6. Reflections of the research methodology

Comparative research is critical to learn from each other in terms of identifying the similarities and differences. When I read the article of Professor Jost Reischmann (2004, 2008), I gained a general understanding of the historical development of the comparative research of adult education. When we worked on this research, we tried to develop a real comparative study. I means that we tried to avoid side by side comparison but noted that using rigorous methods. However, in the process of writing articles, I deeply felt that my text cannot describe what I really want to say. I’ve spent a lot of time on it and the situation makes me anxiety and a little bit frustrated because the new semester is going to start by the next week. I almost want to give up. I felt that if I can use Chinese to write the article I will be able to present results of the study more stringent and better reflect the requirements of the method and theory. That is why we decided not to give oral presentations in the conference. Because to give the presentation means that we have to spend more time to deal with the necessary power points file and other necessary materials to make the presentation clearly. It’s very difficult to realize by English-speaking people.

Finally, I agreed that the comparative study in the field of adult education is really necessary and also very interesting. We are looking forward to it. But for non-English speakers, participating in the comparative study is costly. This is also a great obstacle for us. Anyway I will continue to think issues regarding rationale of the methodology and keep writing without time pressure. Maybe there will have new content when we meet you in the conference.

References


Wei, Hui-Chuan (2012). The construction and application of the successful aging program model (SAPO) : Perspective of normative education needs. Project report (II), The project was funded by National Science Council, Taiwan.

The International Society for Comparative Adult Education (or ISCAE) is a network of individuals and organizations with members in more than thirty countries. The purpose of ISCAE then is the study of the education of adults as practiced in various countries; it also explores the methods, problems and pitfalls of international comparative research in general.

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ISCAE's origins can be traced back to 1960, when Dr. Alexander N. Charters, professor of adult education at Syracuse University, and Canadian scholar of adult education J. Roby Kidd formed a working group on international and comparative adult education at the first world conference of the World Council for Comparative Education in Ottawa. They named their group the Committee for Study and Research in Comparative Adult Education (CSRCAE). The growing International interest in comparative adult education led, in 1992, to a restructuring with a new board and a new president: Jost Reischmann, Chair of Andragogy at Bamberg University, Germany, and to a renaming into "International Society for Comparative Adult Education ISCAE". The upcoming new Internet-technology with an homepage and a mailing list allowed much easier and faster communication and access for scholars from many countries around the globe. These new developments and the conferences increased the number of members from about 50 in 1992 to 250 in 2012. In 2009 Michal Bron Jr, Assoc. Professor Södertörn University, Sweden became new president.

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References

1. ^ http://library.syr.edu/digitalguides/a/AlexanderNCharters/ms_docs/charters44.pdf

External links

- ISCAE home page
- Program from the 2006 conference (pdf format)

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We need: E-Mail, and mailing address. Thank you!

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Postal address is: Prof. Dr. Jost Reischmann, Am Feuersee 3, D72072 Tuebingen, Germany.
We need: email, and mailing address. Thank you!
ISCAE’s 2008 handbook on International Comparative Adult Education:

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The aim of this volume is to collect, share, and discuss the actual knowledge about comparative research in adult education. Comparison means to explicitly identify and analyze similarities and differences in two or more countries. A comparative study includes the attempt to understand why differences and similarities occur and what they tell us about adult education in these countries.

This collection of texts wants to support internationally working researchers and scholars, and the growing number of internationally composed groups and networks in adult education. In its variety of theories, methods, issues, and scopes they mirror the state of the art of research in Comparative Adult Education worldwide.

Book synopsis
Adult and Continuing Education has become a field of action, reflection, and research all over the world. To learn from successful models developed worldwide, this book documents and describes the progress of comparative adult education - aims, contents, methods, obstacles, and prospects. The first part examines basic questions of comparative adult education. The contributions offer a deeper understanding and include warnings of obstacles and pitfalls. They help to design research by building up on the theoretical framework developed in prior research. The second part presents experiences and "lessons learned", suggesting advice and warnings for successful comparative work. The studies in the third part illustrate research methods as well as topics important to researchers in various regions of the world. Descriptions of international institutions in the last part may assist to use their assistance and services.

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