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Rethinking Lifelong Learning with Thailand for teh 21st Century [Part 2]

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University of Missouri-St. Louis

From the Selected Works of John A. Henschke EdD

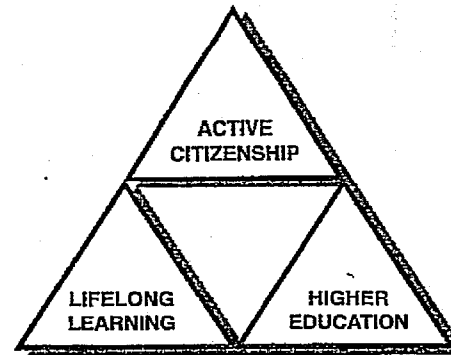
January, 2001

Rethinking Lifelong Learning with Thailand for teh 21st Century [Part 2]

John A. Henschke, EdD



Available at: https://works.bepress.com/john_henschke/104/



The Cape Town Statement

on

**Characteristic Elements of a
Lifelong Learning Higher
Education Institution**

January 2001

"We see a key purpose of lifelong learning as democratic citizenship, Democratic citizenship highlights the importance of women and men as agents of history in all aspects of their lives."

(As quoted by Professor Kadar Asmal, National Minister of Education of South Africa at the opening of the Cape Town conference, 10 October 2000.)

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This statement grew out of a need recognised by adult and higher educators, scholars and specialists in the area of adult and lifelong learning to build on previous work focusing on transforming institutions of higher education into institutions of lifelong learning.

It continues the work begun at the Fifth International Conference on Adult Education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World Conference on Higher Education in Paris in 1998.

It was developed at the conference on Lifelong Learning, Higher Education and Active Citizenship from the 10 – 12 October 2000 in Cape Town which was co-hosted by University of Western Cape, UNESCO Institute of Education and the Adult Education Research Group of the Danish National University of Education.

We wish to acknowledge and thank the organisers of the conference : Professor Shirley Walters, Mr Werner Mauch and Professor Ove Korsgaard, who were assisted by the local team of Jenny Raatz, Glen Arendse, Jos Koetsier, Natheem Hendricks, Terry Volbrecht and Kathy Watters. Thanks also to the participants, who are listed at the back, for their active contributions.

The Cape Town Statement is presented as an organisational tool to be developed further in local contexts. For more information or to give feedback on this document and your use of it, please contact one of the organisers listed at the end of this document.

BACKGROUND

In this statement, we are taking forward the work started at the Fifth International Conference on Adult Education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World Conference on Higher Education in Paris in 1998.

We recall the commitment made in Article 19 (a) of the Agenda for the Future adopted by the Fifth International Conference on Adult Education to

[open] schools, colleges and universities to adult learners:

(a) by requiring institutions of formal education from primary level onwards to be prepared to open their doors to adult learners, both women and men, adapting their programmes and learning conditions to meet their needs;

(b) by developing coherent mechanisms to recognize the outcomes of learning undertaken in different contexts, and to ensure that credit is transferable within and between institutions, sectors and states;

(c) by establishing joint university/community research and training partnerships, and by bringing the services of universities to outside groups;

(d) by carrying out interdisciplinary research in all aspects of adult education and learning with the participation of adult learners themselves;

(e) by creating opportunities for adult learning in flexible, open and creative ways, taking into account the specificities of women's and men's lives;

And we recall the Article 1(b) of the *World Declaration on Higher Education for the Twenty-First Century* which states that core missions and values of higher education are to:

provide opportunities for higher learning and for learning throughout life, giving to learners an optimal range of choice and flexibility of entry and exit points within the system, as well as an opportunity for individual development and social mobility in order to educate for citizenship and for active participation in society, with a worldwide vision, for endogenous capacity building, and for the consolidation of human rights, sustainable development, democracy and peace, in a context of justice;

as well as Article 1(a) of the *Framework for Priority Action for Change and Development of Higher Education* which states that

no discrimination can be accepted, no one can be excluded from higher education or its study fields, degree levels and types of institutions on grounds of race, gender, language, religion, or age or because of any economic or social distinctions or physical disabilities;

We take into account, that lifelong learning is dependent on both the individual and the social context and that learning occurs in institutions, but can also occur anyway, anywhere and at anytime throughout life. That is, it is life long, life wide, and life deep.

As pointed out in *The Mumbai Statement on Lifelong Learning, Active Citizenship and the Reform of Higher Education*, we understand, that

the transformation to genuine lifelong learning institutions requires a holistic approach which a) supports the institution becoming a lifelong learning community itself; b) integrates academic, financial and administrative elements; c) provides structures which are responsible for organizational, staff, student and curriculum development and community engagement; and d) aligns the various supportive structures such as academic information systems, library provision and learning technologies to the new mission of universities in learning societies (Art. 9);

and that a key purpose of lifelong learning is active citizenship which is important in terms of

connecting individuals and groups to the structures of social, political and economic activity in both local and global contexts. Democratic citizenship highlights the importance of women and men as agents of history in all aspects of their lives (Art. 3).

Thus lifelong learning enables students to learn at different times, in different ways, for different purposes at various stages of their lives and careers. Lifelong learning is concerned with providing learning opportunities throughout life, while developing lifelong learners. Furthermore, in a Higher Education Institution (HEI) all members of the institution are learners and that at different times the members of the institution will take on different roles. These roles include educator, student, administrator, cleaner, and so on.

The Future

While we recognise that it is difficult to create a generic document, which can work across differing contexts, and yet still makes sense in a specific context, we have developed a set of elements, which characterise a Lifelong Learning Higher Education Institution, for use as an instrument to assist transformation within HEIs. We also recognise that performance indicators which provide quantifiable measures, covering individual, social and economic development needs would be helpful. The development of such indicators should be based on the profound knowledge of respective systems of higher education and emerging systems of lifelong learning.

In developing indicators which assess a lifelong learning HEI which ensures "no discrimination on grounds of race, gender, language, religion, or age or because of any economic or social distinctions or physical disabilities", it is essential to monitor the experiences of all lifelong learners (including students and staff) across the various social categories. Lifelong learning challenges the dominant paradigm of HEIs, therefore the experiences of adult learners need to be monitored with extra care.

This document suggests the following six sets of characteristic elements which are necessary to support a lifelong learning HEI. The following table gives these six characteristic elements and a short description.

Characteristic Elements	Description
1. Overarching Frameworks	Overarching frameworks provide the contexts, which facilitate an HEI to operate as a lifelong learning institution. These are: Regulatory, Financial and Cultural/Social.
2. Strategic Partnerships and Linkages	Partnerships and linkages include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups in society.
3. Research	Research is understood in a broad sense and includes working across disciplines and / or across institutions. Lifelong learning is regarded as an important and legitimate research area.
4. Teaching and Learning Processes	Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches.
5. Administration Policies and Mechanisms	Service to learners is the top priority of the administration
6. Student Support Systems and Services	Learners are supported to become independent learners in various ways

1. Overarching Frameworks

Overarching frameworks provide the context that facilitates an HEI to operate as a lifelong learning institution. These are: Regulatory, Financial and Cultural/Social.

Regulatory

- A facilitating regulatory framework promotes lifelong learning and covers financial, legal and social concerns.
- The national and/or regional economic and social developmental strategies and implementation plans support lifelong learning.
- A national framework facilitates vertical and lateral mobility of learners.

Financial

- At a national and institutional level a financial plan is in place to support the transformation of HEI into lifelong learning institutions.
- Institutional planning and implementation strategies integrate financial, academic and administrative elements.

Cultural / Social

- There is a culture which supports learning for all, across differences regarding social class, caste, gender, 'race', religion, and at all stages in life.
- There is a national, regional and institutional commitment to making learning opportunities available to all.

2. Strategic Partnerships and Linkages

In partnerships and linkages we include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups/sectors in society.

International partnerships and linkages

- Lifelong learning institutions in the globalizing world strive for a broad exchange on teaching/learning systems and collaboration across national boundaries. This is for: sharing knowledge and know-how; partnerships and alliances based on common interest, mutual respect and desire to attain social justice, globally and locally; enhancing the sharing of skills, research opportunities, and staff and student development.

Partnerships and linkages across institutions and society

- A lifelong learning HEI strives for greater collaboration among institutions and between institutions and client groups such as trade unions, governmental agencies, other educational sectors, social agencies and employers to achieve mutually sought goals. This includes sharing human and other resources and embarking on joint research projects.
- The development of a 'learning region' together with other social partners is part of the commitment of the institution.

Partnerships and linkages within institutions

- Decision-making is a shared responsibility based on collaborative processes among academic staff, service staff and learners to create rapid responses to learner and community needs. These stakeholders are involved in decisions on choice of programmes, assessment of learning outcomes, curriculum design and methods.

- Policies and strategies are in place to foster interaction among learners, faculty, communities and the economy in order to encourage commitments to social justice both locally and globally.
- The lifelong learning HEI is involved in developing, evaluating and implementing educational programmes for all sectors of education, not only the Higher Education sector.

3. Research

Research is understood in a broad sense and includes working across disciplines and / or across institutions. Lifelong learning is regarded as an important and legitimate research area.

- Lifelong learning is regarded as an important and legitimate research and teaching area.
- Research working across disciplines and institutions is recognised and promoted.
- There is collaborative research with civil society, the economy and learners.
- Different paradigms of research are recognised. This includes amongst others action research, case studies and story telling.
- There is ongoing research and development to meet the changing needs of the learner community, to promote broad access and to facilitate successful learning.
- There is ongoing research to assess the transforming institution.

4. The Teaching and Learning Processes

Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches

- Educators engage with the knowledges, interests and life situations that learners contribute to the teaching/learning processes and they build on the resources and experiences of the learners. Different 'ways of knowing' are valued which enable marginalised social groups to be full participants in the creation and dissemination of knowledge.
- Educators facilitate and manage learning rather than dispense information. Learners are seen by educators as co-creators of knowledge and are often encouraged to participate in the design of learning activities including mechanisms of continuous evaluation and feedback.
- Educators recognise the need for reflective / practice based learning.
- Educators recognise the value of keeping up to date with theories and best practices of adult learning across age and other differences.
- Educators and learners recognise that learning in higher education can take place according to flexible schedules and at different locations. They incorporate this into course design and presentation and ensure that the materials and structures for learning made available through the institution overcome the barriers of place, space, time and pace which restrict opportunities for learning in traditional structures.
- The institution makes its resource-based learning environment accessible to learners wherever they are, not just on campus. Learners are encouraged to make use of support services such as the library. Such services are

made available through suitable technology according to the needs of the students' off-campus as well as on campus.

- Course presentation and opportunities to enrol for and study courses include the use of multi- and combined-media delivery and support, utilising the technologies, both old and new, and the flexible learning structures of open and distance learning. This includes print, correspondence, mass media, occasional face-to-face tutorials and study-groups, ICT etc.
- Provision is made for self-paced independent study by providing for students to study effectively wherever, whenever and whatever pace is appropriate for them.
- Assessment takes place in various forms and continuously.
- Programmes include opportunities for experiential learning (e.g. field work, workplace learning, community service learning).

5. Administration Policies and Mechanisms

Service to learners is the top priority of the administration

- The institution needs to indicate in the mission statement its intention to be an open and lifelong learning institution. There also needs to be an implementation strategy as part of the overall planning in the institution together with the necessary resource allocations.
- University course information booklets embrace the notion of lifelong learning.
- Service to students is the top priority of the administration department - so registration, lecture times and academic support are all available at times and in formats geared to the convenience of learners including off-campus open learners. Registration occurs regularly throughout the year.

- Prior learning is recognised, both in terms of obtaining access and getting credit for modules. This includes having clearly defined criteria for what constitutes tertiary level learning.
- Programmes are in place to facilitate implementation of recognising prior learning (RPL). This includes training people to do the assessment as well as preparing educators to be cognisant of RPL in their teaching and design of curriculum.
- In addition to RPL, progress is made towards a more flexible, open entry system which, along with careful counselling, is designed to give students the chance to prove themselves rather than to exclude where formal criteria are not met.
- The turnaround time on assignments, especially for distance students, is kept to a minimum and specified to the learners so that they can use feedback on their assignments to inform their learning on an ongoing basis.
- More flexible curricular compilation structures (in which students can exercise choice of subjects and subject combinations relevant to their own individual needs) are in place leading to recognised qualifications.
- Much more flexible progression rates and ability to move between different study modes within a qualification are in place.
- Programmes are arranged to allow for flexible entry and exit points.

6. Student Support Systems and Services

Learners are supported to become independent learners in various ways

- The obligations and responsibilities of the learners and the educational providers are made clear at registration. It is clear what resources and equipment the provider will supply, and where, and what the learners themselves have to supply.
- The institution creates and maintains geographically dispersed and technologically accessible learning and support structures wherever the students are.
- Tutors are selected and trained for their role of facilitating learning.
- Learners are supported to become independent learners through the use of various forms. These must include: technology old and new throughout the geographical area where students live for tutoring at a distance, contact tutoring, teaching on assignments, mentoring, counselling (both remote and face to face) and the stimulation of peer support structures.
- There is a constant effort to be creative about the ways to keep costs low for students, including multiple avenues for paying tuition.
- Childcare, transport and catering are available to ensure a safe, secure and comfortable environment to meet the needs of all learners. This includes the special needs of learners with a disability as well as those studying at-a-distance.

List of delegates at Cape Town Conference

Prof John Aitchison	South Africa	Prof Ove Korsgaard	Denmark
Ms Lucy Alexander	South Africa	Ms Petra Lawson	South Africa
Ms Randi Anderson	Denmark	Prof Geoff Layer	England
Dr Mejai Avoseh	Namibia	Mr Wolfgang Laumer	South Africa
Mr Ivor Baaljies	South Africa	Prof P.C. Lubout	South Africa
Prof Saleem Badat	South Africa	Ms Mariëda Luyt	South Africa
Dr Gerda Bender	South Africa	Dr Lekhotla Mafisa	South Africa
Mr Johan Bolts	Germany	Mr Werner Mauch	Germany
Ms Maria Bonino	Uruguay	Prof Elana Michelson	USA
Ms Fiona Bulman	South Africa	Ms Ingrid Miller	South Africa
Dr Jana Castle	South Africa	Mr Veli Mnyandu	South Africa
Ms Linda Cooper	South Africa	Mr Daniel Mokoena	South Africa
Dr Beth Crossan	Scotland	Prof Kathy Munro	South Africa
Ms Rabai Dawjee	South Africa	Prof Pauline Murphy	Ireland
Ms Nomvuyo Dayile	South Africa	Prof Danl Nabudere	Uganda
Prof Tony Dodds	Namibia	Dr Renuka Narang	India
Dr Dalina Dowling	South Africa	Dr Alice Ndiddé	Uganda
Dr Pamela Dube	South Africa	Ms Jennifer Newman	Australia
Prof Chris Duke	Australia	Prof Muxa Nkondo	South Africa
Mr Justin Ellis	Namibia	Prof Akapovire Oduaran	Botswana
Ms Lisbeth Eriksson	Sweden	Prof Anglina Parech	South Africa
Ms Ninelle Evans	South Africa	Ms Helen Peters	England
Ms Pia Falkencron	Denmark	Ms Anita Pickerden	England
Ms Judith Favish	South Africa	Mr Larry Pokpas	South Africa
Ms Dahlia Fittler	Australia	Mr Alan Ralphs	South Africa
Prof Charles Fraysen	South Africa	Prof M Razafindraniandriatsiminary	Madagascar
Prof Jim Gallacher	Scotland	Ms Linda Ronnie	Madagascar
Prof Ngabomzi Gawe	South Africa	Mr Peter Rule	South Africa
Mr Jonathan Geldt	South Africa	Mr Johan Serfontein	South Africa
Mr Jorgen Gleeurp	Denmark	Ms Jawaya Small	South Africa
Ms Eve Gray	South Africa	Mr Valerian Strydom	South Africa
Dr Zeida Groener	South Africa	Prof George Subotzky	South Africa
Dr Berndt Gustavsson	Sweden	Dr Ngoato Takalo	South Africa
Ms Judy Harris	England	Ms Mandl Taruvinga	Zimbabwe
Dr Lean Heng	Malaysia	Dr Jane Thompson	England
Dr John Henschke	USA	Ms Deborah Tromp	South Africa
Mr Henner Hildebrand	Germany	Ms Siv Vahamaki-Sundman	Finland
Dr Siphso Hope	South Africa	Ms Suzaan van Aswagan	South Africa
Prof Marianne Horsdal	Denmark	Ms Karen Vaughan	Australia
Ms Angelina Hurley	Australia	Dr L.J. van der Westhuizen	South Africa
Prof Sabo Indabawa	Namibia	Ms Dalene Venter	South Africa
Ms Ferial Isaacs	South Africa	Mr Terry Volbrecht	South Africa
Ms Salma Ismail	South Africa	Prof Serge Wagner	Canada
Prof Peter Jarvis	England	Ms Kathleen Wallace	Australia
Ms Anne Katholre	Uganda	Prof Shirley Walters	South Africa
Ms Caroline Kerfoot	South Africa	Ms Kathy Watters	South Africa
Prof C. T. Keto	South Africa	Dr Tahir Wood	South Africa
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University of the
Western Cape



**Commission on International
Adult Education
(CIAE)**

of the

**American Association for Adult and
Continuing Education
(AAACE)**

**Proceedings
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CIAE Pre-Conference

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Title: Major Elements of Re-Orienting a Higher Education Institution toward A Focus on Lifelong Learning: An Update

Abstract: This paper focuses on making a shift from a traditional higher education institution toward a focus on lifelong learning, including the following: Research on the background and experiences of various institutions in this regard, developing a policy statement on elements of this re-orientation as a product of a worldwide conference, and ultimately constructing "measurable performance indicators" [MPT] for the seven elements — overarching frameworks, strategic partnerships and linkages, research, teaching and learning processes, administration policies and mechanisms, decision support systems, and, student support systems and services. Applications of the MPI to various organizations and countries are also included.

Please continue on to next page.

Major Elements of Re-Orienting a Higher Education Institution Toward A Focus on Lifelong Learning

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Some Adult Educators at the University of Missouri – St. Louis [UM-SL] were involved in researching the background of this topic on the North American Continent and the Northern Hemisphere. Other Adult Educators at The University of The Western Cape [UWC], Cape Town, South Africa were involved in researching the background of this topic on the African Continent and the Southern Hemisphere.

This information was shared as one backdrop for a worldwide conference on the topic of "Lifelong Learning, Higher Education and Active Citizenship" held in Cape Town in October, 2000. There were 95 Adult Educators from 19 countries at the conference. This was also a follow-up and continuation of the work begun at the Fifth International Conference on Adult education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World Conference on Higher Education in Paris in 1998.

These coming together of adult educators resulted in the formulation of the Cape Town Statement on Characteristic Elements of a Lifelong Learning Higher Education Institution. The six elements included: [1] Overarching Frameworks, [2] Strategic Partnerships, [3] Research, [4] Teaching and Learning Processes, [5] Administration Policies and Mechanisms, and, [6] Student Support Systems and Services.

Next, a five member team from The University of Missouri [UM] went to Cape Town to work with personnel from The University of The Western Cape [UWC] in May, 2001. The aim and task of this meeting was to address the issue of moving a higher education institution from a traditional orientation toward a lifelong learning orientation. The team from UM was led by Dr. John Henschke, Associate Professor of Adult Education – UM/St. Louis and Continuing Education Specialist – University Outreach/Extension, East Central Region. Other members of the UM Team were: Dr. Gwendolyn Turner, Associate Professor of Education – UM/St. Louis; Dr. Paulette Isaac, Assistant Professor of Adult Education, UM-St. Louis; Dr. Ron Turner, Executive Vice-President, University of Missouri System; and, Dr. Gary Grace, Vice-Chancellor for Student Affairs, UM/St. Louis.

The first section of this paper reflects mainly the findings that came from the Northern Hemisphere and focuses on the six elements mentioned above.

The second section focuses on the merging of the Northern and Southern Hemisphere findings which resulted in producing a copy of The Cape Town Statement, the definitions of the six elements, an explanation of the details within each of the elements, and a listing of the 95 conference participants [who contributed toward developing The Cape Town Statement], and the 19 countries from which they came.

The third section provides an explanation of how and why the six elements became seven elements, a complete chart of the items within each element, a chart checklist to keep track of progress on each item, and the original with an addendum of bibliographical references from which much of the material was drawn.

The fourth section addresses some updates and follow-through that various institutions have done regarding implementing the characteristics of a lifelong learning re-orientation and their "measurable performance indicators" into higher education and other institutions.

The Background Research Conducted on North American and Northern Hemisphere Institutions

Extensive research and experiments have been conducted into the processes necessary for moving a university or college toward a lifelong learning orientation. These ideas are presented here for consideration and assistance for those who wish to implement and test the ideas in new and different contexts.

This focuses on the following elements: A definition of lifelong learning; Criteria producing a solution to today's lifelong learning issues, Faculty development of good practice oriented toward understanding & helping adults learn; Domains for planning and implementing a successful lifelong learning institution; Understanding developments that will change the environment in which lifelong adult learning will take place, and, The experience of adult learning innovation over the last generation and some of its important contributions to this rapidly changing environment.

I. Lifelong Learning Definition:

A master concept or principle regarded as the continuous and never complete development, changes, and adaptation in human consciousness that occur partly through deliberate action but even more as a result of the business of living, where learning may be intentional or unintentional that includes acquiring greater understanding of other people and the world at large, based on four pillars of learning: learning to live together, learning to know, learning to do, and learning to be.

II. Solution to Today's Lifelong Learning Issues in the University Will Result From:

1. Inclusiveness of adults
 - placing high value on providing education in the adult years
 - ongoing responsiveness to the demand by a dynamic society for providing new forms of adult education

2. Access of learning opportunities for adults through innovation

- responsiveness to adult learners
 - + creation of greater access
 - + increase of
 - * pluralism &
 - * multiculturalism
 - + welcoming of part-time learners
 - + establishment of degree programs that are
 - * external &
 - * competence-based
- a new stage of innovation marked by
 - + changed faculty roles where learning takes priority over teaching (*Note -- see # III below)
 - + new institutional configurations of
 - * web based, asynchronous &
 - * multi-institutional collaboration
 - + broad application of
 - * technology &
 - * distance learning
 - + the enduring values of
 - * egalitarianism
 - * individualism &
 - * pluralism

III. Faculty Development of Good Practice Oriented toward Understanding & Helping Adults Learn in:

1. Determining learner needs

- assessed carefully
- addressed
 - + fairly &
 - + equitably

2. Adult learning programs

- arise from needs assessment &
- planned to accomplish learner outcomes

3. Adult learning experiences

- high quality
 - * positive learning environment
 - * flexibility
 - * adaptability
 - * mutual respect between teacher & learner
- adult learner-centered
 - + encouraging a positive psychological environment for learning
 - + allowing learner participation in the design of experiences
 - + relating learning to learners
 - * prior experience &
 - * application
 - + using varying types of learning techniques
 - + recognizing & addressing different learning styles
 - + providing continuous feedback to learners
 - + arranging appropriate physical settings

4. Adult learning assessment

- outcome based
- designed to evaluate participants' previous learning
 - + formal or
 - + informal

5. Faculty and staff needing

- to be adequately prepared to work with adult learners by
 - + participating in faculty development learning experiences &
 - + keeping abreast with the current literature and research in how to help adults learn
- to participate in ongoing evaluations and development of their own capabilities in six major building blocks of
 - + beliefs and notions about adult learners
 - + perceptions concerning qualities of effective teachers
 - + ideas of the phases and sequences in the learning process
 - + teaching tips and learning techniques
 - + implementing the prepared plan
 - + cultural and contextual awareness
- to articulate and clarify their own teaching philosophy regarding adult learners

6. Programs for adult learners having

- clearly stated missions
- sufficient resources to carry out their missions
 - + rigorous financial administration that supports the adult, lifelong learning mission
 - + necessary services for
 - * learning &
 - * student support
 - + policies governing
 - * learner confidentiality &
 - * other matters
 - + ethical standards for
 - * learner recruitment &
 - * professional practice

7. Characteristics of highly effective adult learning programs are very clearly delineated

It was as though this research snapped multiple pictures of a barely visible phenomenon from various angles, and when developed, all pictures revealed the same clear image.

Results revealed that adults can and do experience significant personal growth at midlife. However, adult students grow significantly only in one type of learning environment, they tended not to grow or to regress in another type. What was the difference? The seven key factors found in learning programs that stimulated adult development are:

1. An environment where students feel safe and supported, where individual needs and uniqueness are honored, where abilities and life achievements are acknowledged and respected.
2. An environment that fosters intellectual freedom and encourages experimentation and creativity
3. An environment where faculty treats adult students as peers—accepted and respected, as intelligent experienced adults whose opinions are listened to, honored, appreciated. Such faculty members often comment that they learn as much from their students as the students learn from them
4. Self-directed learning, where students take responsibility for their own learning. They work with faculty to design individual learning programs which address what each person needs and wants to learn in order to function optimally in their profession
5. Pacing, or intellectual challenge. Optimal pacing is challenging people just beyond their present level of ability. If challenged too far beyond, people give up. If challenged too little, they become bored and learn little. Pacing can be compared to playing tennis with a slightly better player; your game tends to improve. But if the other player is far better and it's impossible to return a ball, you give up. overwhelmed. If the other player is less experienced and can return none of your balls, you learn little. Those adults who reported experiencing high levels of intellectual stimulation—to the point of feeling discomfort—grew more
6. Active involvement in learning, as opposed to passively listening to lectures. Where students and instructors interact and dialogue, where students try out new ideas in the workplace, where exercises and experiences are used to bolster facts and theory, adults grow more.
7. Regular feedback mechanisms for students to tell faculty what works best for them and what they want and need to learn—and faculty who learn and make changes based on student input



8. Changing faculty roles with the focus moving

Away From ----->Toward

The Instructional ParadigmThe Learning ParadigmLearning Theory

- > Knowledge existing 'out there'
- > Knowledge coming in 'chunks' & 'bits' delivered by instructors
- > Learning as cumulative and linear
- > Fits the 'storehouse of knowledge' metaphor
- > Learning as teacher-centered
- > Learning as teacher controlled
- > 'Live' teacher, 'live' students required
- > The classroom and learning are competitive and individualistic
- > Talent and ability are rare

- > Knowledge existing in each person's mind & being shaped by individual experience
- > Knowledge being constructed, created, and internalized
- > Learning as a nesting & interacting of frameworks
- > Fits the 'learning how to ride a bicycle' metaphor
- > Learning as student-centered
- > Learning as the students' responsibility
- > 'Proactive' learner required with teaching resources accessible
- > Learning environments and learning are cooperative, collaborative & supportive
- > Talent and ability are abundant

Productivity/Funding

- > Definition of productivity as instructing the unlearned
- > Cost per hour of instruction per student
- > Funding for hours of instruction

- > Definition of productivity as helping adults learn
 - > Cost per unit of learning per student
 - > Funding for learning outcomes

Nature of Roles

- > Faculty as authoritarian experts
- > Faculty as primarily lecturers
- > Faculty and students acting independently and in isolation
- > Teachers classifying and sorting students
- > Staff serving /supporting faculty and the process of instruction
- > Any expert can teach
- > Line governance; independent actors

- > Faculty as models exemplifying lifelong learning
- > Faculty as primarily designers & implementers of adult learning techniques & environments
- > Faculty and students working in teams with each other and with other staff
- > Teachers helping develop every student's competencies and talents
- > All staff as educators who help produce student learning and success
- > Empowering learning through challenging and complex means
- > Shared governance; teamwork

(90)

IV. Domains for Planning and Implementing A Successful Lifelong Learning University:

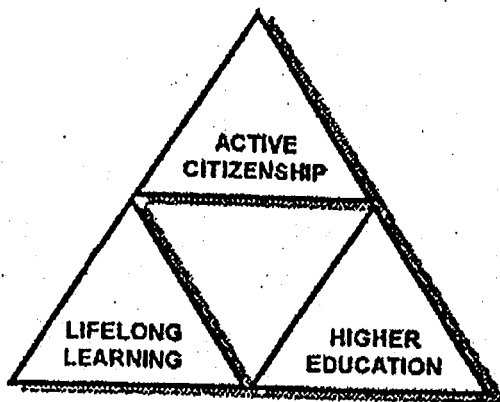
1. A clear written statement of mission and purpose regarding the university becoming a lifelong learning institution;
2. A strong commitment, including funding, to undertake the program of lifelong learning;
3. An appropriate match between adult learners and the program of lifelong learning, as exhibited through
 - Recruitment,
 - Admission into the program,
 - Entry that is welcoming & inviting, &
 - Continuing practices;
4. Provision of a Favorable Climate of Learning, Including
 - Advising,
 - Responsiveness to Inquiries,
 - Supportive procedures for application, &
 - Other services;
5. Provision of an adult learner-oriented curriculum and modes of lifelong learning;
6. Adaptability to adult learner circumstances, either individually or in context;
7. Recognition and involvement of adult learner experience;
8. Commitment and development of faculty and staff to serve lifelong learners;
9. Clearly identified administration and governance for serving lifelong learners;
10. Ongoing evaluations for program enhancement, and documentation increasingly reflecting an orientation toward lifelong learning; and,
11. Positive program impact and future prospects for lifelong learning.

V. Understanding Developments that Will Change the Environment in which Lifelong Adult Learning Will Take Place.

1. Multiple opportunities for learning offered by diverse sources will replace the past monopoly of formal academic institutions.
2. Learners will demand and find greater flexibility and fluidity in the learning process and the accrediting of learning.
3. Technology not only will open up access to more learning but will conquer barriers of time, distance, and convenience that previously have been prohibitive.
4. Learners will plan their own learning as they need it. They will demand just-in-time learning in segments or modules to serve as building blocks to further credentials. They will seek out peers, knowledgeable persons, and other informal sources of learning wherever they are.
5. Many learners will need guidance to and help with appropriate selection among the many sources of information and learning. Services will need to be provided along the lines of a lifelong learning resource system made up of institutions, voluntary organizations, economic enterprises, the media, environmental resources, and people.
6. Employers and consumers will have greater expectation that credentials accurately represent ability to apply learning and perform roles based on that learning.
7. Many persons will experience learning as a continual process intertwined with living that enhances their economic potential, enriches their lives, and engages them with their surrounding society.
8. Disparity and inequality will continue among more and less educated people. Those who do not now recognize the value of lifelong learning will have to be actively engaged in developing their potential.
9. Greater collaboration will be necessary among institutions to share resources and between institutions and client groups such as employers, unions, governmental agencies, and social agencies to achieve mutually sought learning goals.

VI. The Experience of Adult Learning Innovation Over the Last Generation Has Contributed Some Important Elements to this Rapidly Changing Environment.

1. It has broken the constraints of older systems that prevented change.
2. It has driven institutions to explore alternative processes to reach agreed-upon ends.
3. It has raised the lifelong learners' expectations that adaptation and innovation be the order of the day in this new generation:
 - successful flexibility in
 - + time,
 - + place,
 - + routine;
 - learning designs to serve students' varying goals;
 - learner-centered models to accommodate self-determining initiative of many learners;
 - faculty serving as mentors & facilitators to assist autonomy of learners selecting learning resources;
 - combining sensitivity and adaptability to individual learning styles in more structured models serving focused objectives of some groups;
 - reaching persons who reject or are unaware of the possibility of learning; and,
 - increasingly including and involving persons who have been underrepresented in higher education in the past.



The Cape Town Statement

on

**Characteristic Elements of a
Lifelong Learning Higher
Education Institution**

January 2001

"We see a key purpose of lifelong learning as democratic citizenship, Democratic citizenship highlights the importance of women and men as agents of history in all aspects of their lives."

(As quoted by Professor Kadar Asmal, National Minister of Education of South Africa at the opening of the Cape Town conference, 10 October 2000.)

This statement grew out of a need recognised by adult and higher educators, scholars and specialists in the area of adult and lifelong learning to build on previous work focusing on transforming institutions of higher education into institutions of lifelong learning.

It continues the work begun at the Fifth International Conference on Adult Education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World

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Conference on Higher Education in Paris in 1998.

It was developed at the conference on Lifelong Learning, Higher Education and Active Citizenship from the 10 - 12 October 2000 in Cape Town which was co-hosted by University of Western Cape, UNESCO Institute of Education and the Adult Education Research Group of the Danish National University of Education.

We wish to acknowledge and thank the organisers of the conference : Professor Shirley Walters, Mr Werner Mauch and Professor Ove Korsgaard, who were assisted by the local team of Jenny Raatz, Glen Arendse, Jos Koetsier, Natheem Hendricks, Terry Volbrecht and Kathy Watters. Thanks also to the participants, who are listed at the back, for their active contributions.

The Cape Town Statement is presented as an organisational tool to be developed further in local contexts. For more information or to give feedback on this document and your use of it, please contact one of the organisers listed at the end of this document.

BACKGROUND

In this statement, we are taking forward the work started at the Fifth International Conference on Adult Education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World Conference on Higher Education in Paris in 1998.

We recall the commitment made in Article 19 (a) of the Agenda for the Future adopted by the Fifth International Conference on Adult Education to

[open] schools, colleges and universities to adult learners:

- (a) by requiring institutions of formal education from primary level onwards to be prepared to open their doors to adult learners, both women and men, adapting their programmes and learning conditions to meet their needs;*
- (b) by developing coherent mechanisms to recognize the outcomes of learning undertaken in different contexts, and to ensure that credit is transferable within and between institutions, sectors and states;*
- (c) by establishing joint university/community research and training partnerships, and by bringing the services of universities to outside groups;*
- (d) by carrying out interdisciplinary research in all aspects of adult education and learning with the participation of adult learners themselves;*
- (e) by creating opportunities for adult learning in flexible, open and creative ways, taking into account the specificities of women's and men's lives;*

And we recall the Article 1(b) of the World Declaration on Higher Education for the Twenty-First

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Century which states that core missions and values of higher education are to:

provide opportunities for higher learning and for learning throughout life, giving to learners an optimal range of choice and flexibility of entry and exit points within the system, as well as an opportunity for individual development and social mobility in order to educate for citizenship and for active participation in society, with a worldwide vision, for endogenous capacity building, and for the consolidation of human rights, sustainable development, democracy and peace, in a context of justice;

as well as Article 1(a) of the *Framework for Priority Action for Change and Development of Higher Education* which states that

no discrimination can be accepted, no one can be excluded from higher education or its study fields, degree levels and types of institutions on grounds of race, gender, language, religion, or age or because of any economic or social distinctions or physical disabilities;

We take into account, that lifelong learning is dependent on both the individual and the social context and that learning occurs in institutions, but can also occur anyway, anywhere and at anytime throughout life. That is, it is life long, life wide, and life deep.

As pointed out in *The Mumbai Statement on Lifelong Learning, Active Citizenship and the Reform of Higher Education*, we understand, that

the transformation to genuine lifelong learning institutions requires a holistic approach which a) supports the institution becoming a lifelong learning community itself; b) integrates academic, financial and administrative elements; c) provides structures which are responsible for organizational, staff, student and curriculum development and community engagement; and d) aligns the various supportive structures such as academic information systems, library provision and learning technologies to the new mission of universities in learning societies (Art. 9);

and that a key purpose of lifelong learning is active citizenship which is important in terms of

connecting individuals and groups to the structures of social, political and economic activity in both local and global contexts. Democratic citizenship highlights the importance of women and men as agents of history in all aspects of their lives (Art. 3).

Thus lifelong learning enables students to learn at different times, in different ways, for different purposes at various stages of their lives and careers. Lifelong learning is concerned with providing learning opportunities throughout life, while developing lifelong learners. Furthermore, in a Higher Education Institution (HEI) all members of the institution are learners and that at different times the members of the institution will take on different roles. These roles include educator, student, administrator, cleaner, and so on.

The Future

While we recognise that it is difficult to create a generic document, which can work across differing contexts, and yet still makes sense in a specific context, we have developed a set of elements, which characterise a Lifelong Learning Higher Education Institution, for use as an instrument to assist transformation within HEIs. We also recognise that performance indicators which provide quantifiable measures, covering individual, social and economic development needs would be helpful. The development of such indicators should be based on the profound knowledge of respective systems of higher education and emerging systems of lifelong learning.

In developing indicators which assess a lifelong learning HEI which ensures "no discrimination on

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grounds of race, gender, language, religion, or age or because of any economic or social distinctions or physical disabilities", it is essential to monitor the experiences of all lifelong learners (including students and staff) across the various social categories. Lifelong learning challenges the dominant paradigm of HEIs, therefore the experiences of adult learners need to be monitored with extra care.

This document suggests the following six sets of characteristic elements which are necessary to support a lifelong learning HEI. The following table gives these six characteristic elements and a short description.

Characteristic Elements	Description
1. Overarching Frameworks	Overarching frameworks provide the contexts, which facilitate an HEI to operate as a lifelong learning institution. These are: Regulatory, Financial and Cultural/Social.
2. Strategic Partnerships and Linkages	Partnerships and linkages include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups in society.
3. Research	Research is understood in a broad sense and includes working across disciplines and / or across institutions. Lifelong learning is regarded as an important and legitimate research area.
4. Teaching and Learning Processes	Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches.
5. Administration Policies and Mechanisms	Service to learners is the top priority of the administration
6. Student Support Systems and Services	Learners are supported to become independent learners in various ways

1. Overarching Frameworks

Overarching frameworks provide the context that facilitates an HEI to operate as a lifelong learning institution. These are: Regulatory, Financial and Cultural/Social.

Regulatory

- A facilitating regulatory framework promotes lifelong learning and covers financial, legal and

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social concerns.

- The national and/or regional economic and social developmental strategies and implementation plans support lifelong learning.
- A national framework facilitates vertical and lateral mobility of learners

Financial

- At a national and institutional level a financial plan is in place to support the transformation of HEI into lifelong learning institutions.
- Institutional planning and implementation strategies integrate financial, academic and administrative elements.

Cultural/ Social

- There is a culture which supports learning for all, across differences regarding social class, caste, gender, 'race', religion, and at all stages in life.
- There is a national, regional and institutional commitment to making learning opportunities available to all.

2. Strategic Partnerships and Linkages

In partnerships and linkages we include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups/sectors in society.

International partnerships and linkages

- Lifelong learning institutions in the globalizing world strive for a broad exchange on teaching/learning systems and collaboration across national boundaries. This is for: sharing knowledge and know-how; partnerships and alliances based on common interest, mutual respect and desire to attain social justice, globally and locally; enhancing the sharing of skills, research opportunities, and staff and student development.

Partnerships and linkages across institutions and society

- A lifelong learning HEI strives for greater collaboration among institutions and between institutions and client groups such as trade unions, governmental agencies, other educational sectors, social agencies and employers to achieve mutually sought goals. This includes sharing human and other resources and embarking on joint research projects.
- The development of a 'learning region' together with other social partners is part of the commitment of the institution

Partnerships and linkages within institutions

- Decision-making is a shared responsibility based on collaborative processes among academic staff, service staff and learners to create rapid responses to learner and community needs. These stakeholders are involved in decisions on choice of programmes, assessment of learning outcomes, curriculum design and methods.
- Policies and strategies are in place to foster interaction among learners, faculty, communities

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- and the economy in order to encourage commitments to social justice both locally and globally.
- The lifelong learning HEI is involved in developing, evaluating and implementing educational programmes for all sectors of education, not only the Higher Education sector

3. Research

Research is understood in a broad sense and includes working across disciplines and / or across institutions. Lifelong learning is regarded as an important and legitimate research area.

- Lifelong learning is regarded as an important and legitimate research and teaching area.
- Research working across disciplines and institutions is recognised and promoted.
- There is collaborative research with civil society, the economy and learners.
- Different paradigms of research are recognised. This includes amongst others action research, case studies and story telling.
- There is ongoing research and development to meet the changing needs of the learner community, to promote broad access and to facilitate successful learning.
- There is ongoing research to assess the transforming institution

4. The Teaching and Learning Processes

Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches

- Educators engage with the knowledges, interests and life situations that learners contribute to the teaching/learning processes and they build on the resources and experiences of the learners. Different 'ways of knowing' are valued which enable marginalised social groups to be full participants in the creation and dissemination of knowledge.
- Educators facilitate and manage learning rather than dispense information. Learners are seen by educators as co-creators of knowledge and are often encouraged to participate in the design of learning activities including mechanisms of continuous evaluation and feedback.
- Educators recognise the need for reflective / practice based learning.
- Educators recognise the value of keeping up to date with theories and best practices of adult learning across age and other differences.
- Educators and learners recognise that learning in higher education can take place according to flexible schedules and at different locations. They incorporate this into course design and presentation and ensure that the materials and structures for learning made available through the institution overcome the barriers of place, space, time and pace which restrict opportunities for learning in traditional structures.
- The institution makes its resource-based learning environment accessible to learners wherever they are, not just on campus. Learners are encouraged to make use of support services such as the library. Such services are made available through suitable technology according to the needs of the students' off-campus as well as on campus.
- Course presentation and opportunities to enrol for and study courses include the use of multi- and combined-media delivery and support, utilising the technologies, both old and new, and the flexible learning structures of open and distance learning. This includes print, correspondence, mass media, occasional face-to-face tutorials and study-groups, ICT etc.

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- Provision is made for self-paced independent study by providing for students to study effectively wherever, whenever and whatever pace is appropriate for them.
- Assessment takes place in various forms and continuously.
- Programmes include opportunities for experiential learning (e.g. field work, workplace learning, community service learning)

5. Administration Policies and Mechanisms

Service to learners is the top priority of the administration

- The institution needs to indicate in the mission statement its intention to be an open and lifelong learning institution. There also needs to be an implementation strategy as part of the overall planning in the institution together with the necessary resource allocations.
- University course information booklets embrace the notion of lifelong learning.
- Service to students is the top priority of the administration department - so registration, lecture times and academic support are all available at times and in formats geared to the convenience of learners including off-campus open learners. Registration occurs regularly throughout the year.
- Prior learning is recognised, both in terms of obtaining access and getting credit for modules. This includes having clearly defined criteria for what constitutes tertiary level learning.
- Programmes are in place to facilitate implementation of recognising prior learning (RPL). This includes training people to do the assessment as well as preparing educators to be cognisant of RPL in their teaching and design of curriculum.
- In addition to RPL, progress is made towards a more flexible, open entry system which, along with careful counselling, is designed to give students the chance to prove themselves rather than to exclude where formal criteria are not met.
- The turnaround time on assignments, especially for distance students, is kept to a minimum and specified to the learners so that they can use feedback on their assignments to inform their learning on an ongoing basis.
- More flexible curricular compilation structures (in which students can exercise choice of subjects and subject combinations relevant to their own individual needs) are in place leading to recognised qualifications.
- Much more flexible progression rates and ability to move between different study modes within a qualification are in place.
- Programmes are arranged to allow for flexible entry and exit points.

6. Student Support Systems and Services

Learners are supported to become independent learners in various ways

- The obligations and responsibilities of the learners and the educational providers are made clear at registration.
- It is clear what resources and equipment the provider will supply, and where, and what the learners themselves have to supply.
- The institution creates and maintains geographically dispersed and technologically accessible learning and support structures wherever the students are.
- Tutors are selected and trained for their role of facilitating learning.
- Learners are supported to become independent learners through the use of various forms.

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These must include: technology old and new throughout the geographical area where students live for tutoring at a distance, contact tutoring, teaching on assignments, mentoring, counselling (both remote and face to face) and the stimulation of peer support structures.

- There is a constant effort to be creative about the ways to keep costs low for students, including multiple avenues for paying tuition.
- Childcare, transport and catering are available to ensure a safe, secure and comfortable environment to meet the needs of all learners. This includes the special needs of learners with a disability as well as those studying at-a-distance.

List of delegates at Cape Town Conference

Prof John Alitchison	South Africa	Prof Ove Korsgaard	Denmark
Ms Lucy Alexander	South Africa	Ms Petra Lawson	South Africa
Ms Randi Anderson	Denmark	Prof Geoff Layer	England
Dr Mejai Avoseh	Namibia	Mr Wolfgang Leumer	South Africa
Mr Ivor Baatjies	South Africa	Prof P.C. Lubout	South Africa
Prof Saleem Badat	South Africa	Ms Mariëda Luyt	South Africa
Dr Gerda Bender	South Africa	Dr Lekhotla Mafisa	South Africa
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Ms Maria Bonino	Uruguay	Prof Elana Michelson	USA
Ms Fiona Bulman	South Africa	Ms Ingrid Miller	South Africa
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Ms Linda Cooper	South Africa	Mr Daniel Mokoena	South Africa
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Ms Rabai Dawjee	South Africa	Prof Pauline Murphy	Ireland
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Prof Tony Dodds	Namibia	Dr Renuka Narang	India
Dr Dalina Dowling	South Africa	Dr Alica Ndidde	Uganda
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Dr Zelda Groener	South Africa	Prof George Subotzky	South Africa
Dr Bernt Gustavsson	Sweden	Dr Ngoato Takalo	South Africa
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Dr John Henschke	USA	Ms Deborah Tromp	South Africa
Mr Henner Hildebrand	Germany	Ms Siv Vahamaki-Sundman	Finland
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The Measurable Performance Indicators

One of the major trends in LLL focuses on Performance Indicators (PI) that require the characteristic elements to be measurable and concrete in action. It is well to note that moving educational institutions toward serving the needs of all lifelong learners, is a lifelong endeavor that will continue for many years. The discussions between the UM Team and the UWC Personnel modified the original six (6) "Characteristic Elements" into seven (7). The seventh one that was added to the original six was "Decision Support Systems. A few accompanying "Measurable Performance Indicators" are indicated in the list that follows.

- (1) **Overarching Frameworks** – provide the context that facilitates operation as a lifelong learning institution. This would mean that all stakeholders relating to the institution have a financial policy and implementation plan, the legal framework, and the cultural/social sensitivity as a foundation to operating the institution for serving lifelong learners.
- (2) **Strategic Partnerships & Linkages** – form collaborative relationships internationally, with other institutions nationally, and with other groups in society. The indicators needed here will focus on increasing the institution wide concern with promoting and increasing the number and quality of partnerships across multiple departmental, institutional, national, and international boundaries. Decisions regarding choice of programmes, assessment of learning outcomes, curriculum design and methods are a shared responsibility based on collaborative processes among academic staff, service staff and learners.
- (3) **Research** – includes working across disciplines, institutions, investigating what kinds of institutional adjustments need to be made to help the institution better serve lifelong learners: i.e. convenience, transportation, child care services, locations of offerings, library accessibility, computer and website services, etc. In addition, targets are set for increasing and encouraging a broader range of research paradigms: action research, case studies, story telling, etc.

- (4) **Teaching & Learning Processes** – Educators will need to move their teaching and learning processes away from the “instructional paradigm” toward the “learning paradigm,” thus encouraging self-directed learning, engaging with the knowledges, interests and life situations which learners bring to their education, and using open and resource based learning approaches. They will need to use different teaching methods that respond to the diverse learning styles of lifelong learners, including co-learning, interactive learning, and continuous learning while integrating appropriate technology. The learners and faculty will need to mutually design individual learning programs that address what each learner needs and wants to learn in order to function optimally in their profession. This all means that the institution plans to employ and develop faculty who see their primary roles as facilitators of the learning process as opposed to dispensers of information, thus moving their development toward: knowing as a dialogical process; a dialogical relationship to oneself; being a continuous learner; self-agency and self-authorship; and connection with others.
- (5) **Administration Policies & Mechanisms** – service to learners is the top priority of the administration. The mission statement and allocation of resources, including staffing is increased to reflect the institutional commitment for operating a lifelong learning institution. The operational system is imbued with a belief that demonstrates active and systematic listening turned into responsiveness to meet needs of lifelong learners. Registration, class times, and courses – including modular choices and academics support – are available at times and in formats geared to the convenience of learners.
- (6) **Decision Support Systems** – provide within the institution and community an atmosphere that is people-centered, caring, warm, informal, intimate and trusting. It also maintains a demographic profile on programs aimed at increasing the numbers of: students served, courses offered, locations of offerings, and contracts for educational programs with different organizations.
- (7) **Student Support Systems & Services** – provides learner-friendliness, convenient schedules, and in various ways encourages independent learning. Obligations and responsibilities of the learners, educational providers and administration service are made clear from the beginning.

The complete list of “measurable performance indicators” follows in the extensive chart provided on the next pages.

“MEASURABLE PERFORMANCE INDICATORS”
FOR THE
CHARACTERISTIC ELEMENTS
OF A
LIFELONG LEARNING
HIGHER EDUCATION INSTITUTION

This is our “outsiders” perspective of what we think are indicators of a lifelong learning educational institution (HEI). However, there is one thing that needs to be made clear: Lifelong Learning (LLL) is a contested concept—there is no agreement on where and in what institutions LLL should or should not be implemented.

Definition:

Lifelong Learning is a master concept or principle regarded as the continuous and never complete development, changes, and adaptation in human consciousness that occur partly through deliberate action but even more as a result of the business of living, where learning may be intentional or unintentional that includes acquiring greater understanding of other people and the world at large, based on four pillars: being, knowing, doing, and living together.

I. Overarching Frameworks

<i>Overarching frameworks provide the context that facilitates an EI to operate as a lifelong learning institution.</i>	doing already	working towards	not doing	not sure	comments / evidence
Regulatory					
1. The National Department of Education has a financial policy and implementation plan in place to promote lifelong learning at HEIs.					
2. The National Department of Education has the legal framework and an implementation plan in place to promote lifelong learning at HEIs.					
3. The National Department of Education has addressed social concerns in their policy and implementation plan to promote lifelong learning at HEIs.					
4. The regional economic and social developmental plans include supporting lifelong learning.					
5. The Institution has a financial plan in place to support lifelong learning.					
6. The Institution has a culture that supports adult centered learning and is sensitive to and respectful of the needs, differences, and contributions they bring to the teaching and learning transaction.					
7. An active collaboration and communication across all segments of the institution to meet the educational, career, financial, and personal needs of LLLs.					
8. There needs to be a deliberate on-going commitment to high level of communication between the University and LLLs.					

II. Strategic Partnerships and Linkages

<i>In partnerships and linkages we include three types of relationships</i>	doing already	working towards	not doing	not sure	comments / evidence
International partnerships and linkages					
<u>1.</u> A record is kept and uses are made at the institutional level of the extent of exchange, sharing of skills, research opportunities, student and staff development, and collaboration across national boundaries.					
Partnerships and linkages across institutions & society					
<u>2.</u> A record is kept and uses are made at the institutional level of the extent of collaboration in terms of the sharing of human and other resources, as well as joint research projects across institutions and society. This includes trade unions, governmental agencies, other educational sectors, and employers.					
Partnerships and linkages within institutions					
<u>3.</u> A record is kept and uses are made at the faculty level of responses to learner and community needs.					
<u>4.</u> A record is kept and uses are made for reviewing periodically for program improvement and evaluation to determine how the types of relationships are improving programs.					
<u>5.</u> A record is kept and used for making appropriate adaptations and modifications.					

III. Research

<i>Research is understood in a broad sense and includes working across disciplines and/or across institutions. Lifelong learning is regarded as an important and legitimate research area.</i>	doing already	working towards	not doing	not sure	comments/ evidence	area
1. Collaborative research across disciplines and/or institutions is promoted and a record of this work is kept at faculty level.						
2. Collaborative research with civil society, the economy and learners is promoted and a record of this work is kept at faculty level.						
3. A broad range of research paradigms are used. Targets are set to increase forms such as action research, case studies and story telling.						
4. Appropriate mechanisms are established to evaluate the extent to which The Institution's indicators are fulfilled.						
5. Performance indicators of lifelong learning will continue to be developed and enhanced during the life of the institution.						
6. Systematic dissemination of research information to the general public and population.						
7. Systematic collection of data on student expectations, experiences, needs, and satisfaction level.						
8. Appropriate mechanisms will be established to evaluate the extent to which The Institution's indicators are fulfilled.						
9. Performance indicators of LLL will continue to be developed and improved over the LLL of the institution.						

IV. The Teaching and Learning Processes

<i>Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches.</i>									
<i>The institution provides a central infrastructure in the form of libraries services, informational support and personnel necessary for lifelong learners.</i>									
<i>Self-directed learning (SDL) is one of the highly effective characteristics of LLL. SDL is where students take responsibility of their own learning. They work with faculty to design individual learning programs that address what each person needs and wants to learn in order to function optimally in their profession.</i>									
<i>Active involvement in learning -- as opposed to passively listening to lectures, where students and instructors interact and dialogue, where students try out new ideas in the workplace, where exercises and experiences are used to bolster facts and theory -- helps adults grow more.</i>									
Institution role									
<i>Plans exist to employ and develop faculty who see their primary roles as facilitators of the learning process as opposed to dispensers of information.</i>				doing already	working towards	not doing	not sure	comments / evidence	area
<i>1. The institution employs faculty who do not limit themselves to the traditional role of lecturer in the classroom, and may perform in blended roles that include administrative duties, advising, teaching and facilitating. [Council for Adult & Experiential Learning (CAEL).]</i>									

2. The institution engages all learners in a thorough process of education and career planning to determine their level of educational development upon entry, their educational and career goals, and a plan for reaching these goals as efficiently as possible. (CAEL)							
3. Number of credits awarded for Recognition of Prior Learning (RPL) / Alternative missions and life experiences are increased by a certain percentage within a specified time period.							
4. The institution is supportive of staff development.							
5. The institution supports on-going summative evaluations at the end of the modules for improvement of instruction and for the benefit of learners.							
6. Up-to-date records are kept of enrollment and throughput of adult learners.							
7. Content of the lecturer development needs to be oriented toward facilitation of LLL.							
8. The institution approves and certifies a variety of instructional delivery systems.							
9. The institution provides an atmosphere that is people-centered, caring, warm, informal, intimate, and trusting.							
Educator role							
<i>The educator should understand and reflect the values of the mission in curriculum design and delivery.</i>							
<i>Educators will respond to the needs of students who enter alternative admissions policies.</i>							
<i>An environment is needed where faculty treats adult students as peers – accepted and respected as intelligent, experienced adults whose opinions are listened to, honored, and appreciated.</i>							
<i>The educators are encouraged to use different teaching methods and techniques to respond to the diverse learning styles of LLLs including a co-learning, interactive learning, and continuous learning while also integrating appropriate technology.</i>							

Educator Role (continued)						
10. Educators and tutors demonstrate competencies as lifelong learners effective learner-centered instruction.						
11. An environment is provided where faculty treats adult students as peers—accepted and respected as intelligent experienced adults whose opinions are listened to, honored, appreciated.						
12. Educators will improve their own competencies in LLL.						
13. Educators will offer themselves to the students as exemplifying a model of LLL.						
14. The curriculum is developed so that traditionally marginalized social groups inside and outside the institution can be full participants.						
15. Assessment is conducted in various forms and used to improve the quality of learning in LLLs.						
16. Educators optimally pace and challenge the learners' intelligence just beyond their present learning abilities.						
Learner role						
17. Learners provide the faculty with relevant information so they can assess educational development and convey credit where appropriate.						
18. Learners engage actively in the process of learning.						
19. Learners perceive that their individual needs and uniqueness are respected.						
20. Learners perceive that their abilities and life achievements have been acknowledged and respected in the classroom.						
21. Learners are engaged in a self-assessment process for determining readiness for self-direction in carrying out their LLL.						
22. Learners will engage in Self-Directed Learning (SDL).						
23. Learners will seek intellectual challenge.						
24. Learners will engage actively with the lecturer and other students.						
25. Learners will pursue intellectual freedom, experimentation and creativity.						
26. Learner expects to be treated as an intelligent adult whose opinions are listened to, honored, and appreciated.						

V. Administration Policies and Mechanisms

<i>Service to learners is the top priority of the administration</i>	doing already	working towards	not doing	not sure	comments / evidence /
1. The mission statement and the allocation of resources, including staffing, reflect the commitment of the institution to lifelong learning (LLL) at The Institution.					
2. There is a strategic plan and action steps for implementing lifelong learning in the institution.					
3. Admission processes are inclusive and non-competitive so as to match the educational processes to the needs of the lifelong learners.					
4. There is Council commitment and executive leadership to implement the lifelong learning policy.					
Recruitment / Marketing					
5. The operational system is imbued with a belief that demonstrates active and systematic listening turned into responsiveness to meet the needs of lifelong learners.					
6. The marketing process, covering all faculties, target a wide range of learners, specifically traditionally marginalised groups.					
7. Admission processes are inclusive and non-competitive so as to make a match of the educational processes to the needs of the LLLs.					
8. The information booklet addresses the needs of the entire target population, including part-time learners.					
9. The information booklet supports the notion of lifelong learning.					
10. The marketing process reflects an understanding of and sensitivity to the roles and responsibilities of adults.					
11. The marketing process reflects an understanding of and sensitivity to the roles and responsibilities of adult learners.					
12. Alumni are encouraged to invite others to join this lifelong learning institution.					

Access					
13. The entry and exit points of programmes are flexible					
14. All learners have access to scholarships, including part time learners.					
15. Registration, lecture times, and courses – including modular choices and academic support – are available at times and in formats geared to the convenience of learners.					
16. Prior learning is recognised, both in terms of obtaining access and getting credit for modules.					
Throughput					
17. Systematic data of student throughput are collected, analyzed, and distributed throughout the university for the purpose of improving the graduation rate of LLLs.					
18. Systematic data of student throughput are collected, analyzed, and distributed throughout the university for the purpose of supporting and improving student successes.					

VI. Decision Support Systems

	doing already	working towards	not doing	not sure	comments / evidence
1. The institution conducts an annual assessment and evaluation of lifelong learners' needs, expectations, and satisfaction for the purpose of tracking, marketing, and improving programs/services.					
2. A demographic profile is kept on programs aimed at increasing the numbers of:					
-- students					
-- courses offered					
-- locations of offerings					
-- contracts with different organizations					
3. Decisions regarding choice of programmes, assessment of learning outcomes, curriculum design, and methods is a shared responsibility based on collaborative processes among academic staff, service staff and learners.					
4. Alumni are actively sought and encouraged to recruit others to join this lifelong learning institution.					
5. Courses are regularly assessed by learners.					
6. Curriculum development for lifelong learning with appropriate approval mechanisms will be established, maintained, and evaluated.					
7. The Institution provides an atmosphere that is people-centered, caring, warm, informal, intimate, and trusting.					

VII. Student Support Systems and Services

<i>The institution provides learner-friendly services at times convenient to the schedules of lifelong learners. Learners are also supported to become independent learners in various ways.</i>	doing already	working towards	not doing	not sure
1. Obligations and responsibilities of the learners, educational providers and administration services are made clear from the beginning.				
2. The strategic plan provides for:				
-- transport and catering facilities are available for part-time learners				
-- the needs of learners with a disability are looked after				
-- the needs of learners studying at a distance are looked after				
-- childcare facilities are available				
-- safe and secure learning environment				
-- health care facilities are available for all learners				
3. Support structures are in place for wherever and whenever there are learners.				
4. Support programmes are available to educators requiring guidance in dealing with "non-traditional" students.				
5. Counseling (remote and face-to-face), advising, and career development are all visible commitments to learners who are enrolled in evening classes				

Lifelong Learning Resource Macro-System

A Learning Center [REDACTED]

The Purpose of this Lifelong Learning Center

Would Be to Help Move Learners:

Away From Just \longrightarrow Toward

“Being A Knowledgeable Person”

“Being A Competent Person”

The highest competence would be:

- Continuous, Self-Directed, Lifelong Learning;
- The Ability continuously to –
 - Anticipate New Conditions
 - Change in Ways that Would
 - Enable a Learner to
 - Avoid Becoming Obsolete.

This will be an educational learning system that would:

- Develop Cooperative People Who
 - See Themselves as Local and Global Citizens,
 - Are Highly Creative,
 - Are Self-Directed Learners, and
- Foster Learning So That People Will Become
 - Expandingly, *not*
 - Statically

Knowledgeable.

I. All of this is to Take Place in:

- A Lifelong Learning Resource System [LLRS] –
- A Consortium of All The Learning Resources in a Community, including --

1. Institutions:

- a. Specialized Educational Institutions;
- b. Religious Institutions;
- c. Health and Social Service Agencies;
- d. Governmental Agencies;
- e. Museums; and,
- f. Libraries;

2. Voluntary Organizations:

- a. Labor unions;
- b. Consumer and Producer Cooperatives;
- c. Civic and Fraternal Societies;
- d. Agricultural Organizations;
- e. Youth Organizations; Political Organizations; and,
- f. Professional Societies;

3. Economic Enterprises:

- a. Business and Industrial firms;
- b. Farms;
- c. Markets; and,
- d. Trade Association;

4. The Media;**5. Episodic Events:**

- a. Fairs;
- b. Exhibits;
- c. Trips;
- d. Rituals; and,

e. Anniversary Celebrations;

6. Environmental Resources:

- a. Parks;
- b. Reserves;
- c. Zoos;
- d. Forests;
- e. Deserts;
- f. Lakes; and,
- g. Streams;

7. People:

- a. Elders;
- b. Specialists;
- c. Families; and,
- d. Neighborhoods.

II. Operational Policies and Procedures

1. This LLRS Would Be Established by

- a. A Governing Board
- b. Composed of
 - i. Participating Institutions;
 - ii. Organizations' Economic Enterprises;
 - iii. Media; and,
 - iv. Various Categories of Learners.

2. This LLRS Would Be Managed by

- a. Professional Staff;
[See Identification and Designated Roles in 'c' Below]
- b. Who Would Be Especially Learned in
 - i. Lifelong Education
 - 1. Theory, and
 - 2. Practice;

- ii. **Systems Theory;**
- iii. **Information Theory; and,**
- iv. **Collaborative Administration.**
- c. **The Professional Staff Will Consist of Competent Educators of Adult Learners [Lifelong Learners] in Such Roles as Follows:**
 - i. **Educational Diagnosticians**
 - ii. **Level of Learning Assessors**
 - iii. **Educational Planning Consultants**
 - iv. **Resource People/Content Specialists**
 - v. **Administrators**
 - vi. **Information Processors**
 - vii. **Coordinators**
 - viii. **Facilitators of Learning**
 - ix. **Theoreticians of Lifelong Learning**
 - x. **Practitioners of Adult Education**
 - xi. **Professionals Desiring to and Being Willing to Help Others Learn, Grow, Develop and Change**
 - xii. **Professional Educators in Lifelong Learning**

3. In Each Community There Would Be

- a. **A Main Center**
- b. **In Which Would Be Located**
 - i. **A Data Base That**
 - 1. **Contains Information about all The Learning Resources Available to the Community (An Educational Brokering Center), and**
 - 2. **Makes That Information Available to**
 - a. **All Members of the System,**
 - b. **Including Individual Learners.**

4. There Would Be Satellite Learning Centers Within Walking Distance of Every Citizen.

Lifelong Learning Resource System

Satellite Learning Center

III. Here is How the LLRS Satellite Learning Center Would Work for Each Person

1. A Person Would Enter The Satellite Learning Center Nearest Her/His Home
 - a. Starting Perhaps at Age Four or Five
 - b. Returning Periodically for the Rest of Her/His Life.

2. The First Experience Would Be
 - a. Having An Assessment Made of Her/His
 - i. Level of Learning Ability
 - ii. Her/His Current Level of Skill in
 1. Planning and
 2. Carrying out a
 - a. A Self-Directed Learning Project.
 - b. Skill Development Exercises Would Be Provided
 - i. For Both Individual Work, and
 - ii. Small-Group Work
 1. In Helping Her/Him to Move
 2. To A Higher Level of Ability in Self-Directed Learning – Regardless of Age.

3. Next, She/He Would Be Referred to An Educational Diagnostician, Who Would
 - a. Have Access to a Set of Models of the Competencies
 - b. For Performing Various Life Roles,
Such as the Following:

Life Roles and Competencies:

- **The Role of *Learner*, Including Competence in**
 - **Reading**
 - **Writing**
 - **Computing**
 - **Expressing**
 - **Articulating**
 - **Thinking**
 - **Perceiving**
 - **Anticipating the Future**
 - **Conceptualizing**
 - **Imagining**
 - **Inquiring**
 - **Reflecting**
 - **Contemplating**
 - **Observing**
 - **Experimenting**
 - **Testing Ideas**
 - **Intuiting**
 - **Aspiring**
 - **Diagnosing Learning/Change Needs**
 - **Planning Learning/Change Projects**
 - **Locating and Using Material and Human Resources**
(Including Computerized Data Banks)
 - **Learning Virtually**
 - **Giving and Receiving Help from Peers and Resource People, and**
 - **Evaluating Learning/Change Progress**
 - **Internalizing**
 - **Understanding of and Internalizing Religious and Spiritual Truth**

- **The Role of *Unique Self*, Including Competence in**
 - **Self-Analyzing**
 - **Sensing**
 - **Goal Building**
 - **Objectifying**
 - **Expressing**

- Value-Clarifying
- Accepting Self and Others, and
- Being Authentic

- The Role of *Friend*, Including Competence in
 - Loving
 - Listening
 - Empathizing
 - Collaborating
 - Sharing
 - Helping
 - Giving Constructive Feedback, and
 - Being Supportive

- The Role of *Global Citizen*, Including Competence in
 - Caring
 - Participating
 - Leading
 - Decision-Making
 - Discussing
 - Acting
 - Having Perspective (Historical and Cultural)
 - Consciousness Raising
 - Being Able to Understand
 - Appreciate, and
 - Relate to Other Cultures

- The Role of *Family Member*, Including Competence in
 - Maintaining Health
 - Planning
 - Managing
 - Helping
 - Sharing
 - Buying
 - Saving

- Loving, and
- Taking responsibility

- **The Role of *Worker*, Including Competence in**
 - Career Planning
 - Continuing Vocational and Professional Development
 - Using Technical Skills
 - Accepting Supervision
 - Giving Supervision
 - Getting Along With People
 - Cooperating
 - Delegating, and
 - Managing
 - Leading
 - Traveling

- **The Role of *Leisure-Time User*, Including Competence in**
 - Discovering Resources
 - Appreciating the Arts and Humanities
 - Performing
 - Playing
 - Relaxing
 - Reflecting
 - Planning, and
 - Risking

- **The Role of *Cultural Literate*, Including Competence in**
 - Acquiring and Retaining the Changing Foundation of Knowledge and Values
 - Understanding the Above as the Engine of Our Culture

4. At This Point the Educational Diagnostician

- Will Help Her/Him Determine

- Which Life Role
- At What Level of Performance
 - Will Be Appropriate for
 - Her/His Next Stage of Development
- Engage the Learner in a Set of Performance Assessments
 - To Determine What
 1. Knowledge
 2. Understanding
 3. Skills
 4. Attitudes
 5. Values, and
 6. Interests
 - She/He Would Need to Acquire
 - In Order to Achieve the Level of Performance That Was Agreed Upon
- Some of This Assessment Process Would Be in
 - Small Group Activity
 - In Conjunction with Self-Administered Assessment Modules

5. The Learner Would Leave the Educational Diagnostician with "Profile of Diagnosed Learning Needs"

6. Next, the Learner Would Be Referred to an Educational Planning Consultant.

- This Person
 - Would Have Immediate Access to the Data Bank of Learning Resources, and
 - Would Work with The Learner (*Again, Often in Groups*) in Designing a Learning Plan That Would Specify

1. The Learning Objectives Derived From the Diagnosed Learning Needs

2. **The Resources That The Learner Would Ultimately Utilize in Accomplishing Each Objective**
3. **Perhaps a Time Frame For Completing Each Objective**
4. **The Evidence to Be Collected to Indicate the Extent to Which Each Objective Has Been Accomplished, and**
5. **The Means by Which the Evidence Would Be Validated (*Preferably Through Some form of Performance Assessment Rather Than Mere Information Recall*)**

7. The Learner Would Then

- **Go to the Learning Resources Specified in The Learning Plan, Wherever They Might Be in the Community, &**
- **Carry Out The Plan.**

8. Upon Completion of the Learning Plan

- **The Learner Would Return to the LLRS Center**
- **For a Rediagnosis of Learning Needs, and**
- **The Development of A Next-Level Learning Plan**
- **This Process May Be Repeated Throughout the Lifetime of The Learner**

This Process Can Best Be Described As A "Spiral" of Learning Projects, in Contrast to a Linear Curriculum.

Competent Educators of Adult Learners [Lifelong Learners]

- **Educational Diagnosticians**
- **Level of Learning Assessors**
- **Educational Planning Consultants**
- **Resource People/Content Specialists**
- **Administrators**
- **Information Processors**
- **Coordinators**
- **Learning Facilitators**
- **Theoreticians of Lifelong Learning**
- **Practitioners of Adult Education**
- **Professional Educators in Lifelong Learning**
- **Professionals Desiring to and Being Willing to Help Others
Learn, Grow, Develop and Change**

Adult Education, a Global Field
and Profession:
Contributions of UNESCO

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Instructional Leadership Doctoral Program**

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**Documents and Power Point Presentation
at the American Association for Adult and Continuing Education Conference
October 28, 2010
Clearwater Beach, Florida**

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UNESCO CONFINTEA VI
(6th World Conference in Adult Education)
Belem, Para, Brazil December 1-4, 2009

“Belem Framework for Action”

***Harnessing the power and potential
of adult learning and education for
a viable future***

Preamble

144 Member States of UNESCO represented

- Civil Society Organizations
- Social Partners
- United Nation Agencies
- Intergovernmental Agencies
- Private Sector

The Fundamental Role of Adult Learning and Education

- We Reiterate This Agenda to Move It Forward With Urgency and Dispatch
- It Was Laid Down During (CONFINTEA I-V)

We Endorse the Definition of Adult Education

- First Adopted in Nairobi – 1976
- Further Developed in Hamburg – 1997
- “The Entire Body of Ongoing Learning Processes”

We Affirm that Literacy is the Most Significant Foundation

- Upon Which to Build
 - Comprehensive
 - Inclusive
 - Integrated Learning
 - Lifelong and
 - Life-Wide
- For All Young People and Adults

The Education of Young People and Adults

- Enables Individuals, Especially Women
 - To Cope With Multiple Crises
 - Social
 - Economic
 - Political, and
 - Climate Change

We Therefore Adopt This

- Belem Framework for Action
- To Guide Us into Our Adult Education Future

Towards Lifelong Learning

Lifelong Learning Is "From Cradle to Grave"

- It Is Critical in Addressing Global
 - Issues and
 - Challenges
- We Reaffirm the Six Pillars of Learning
 - To Know
 - To Do
 - To Be
 - To Live Together
 - To Change
 - To Develop Sustainability

Adult Learning and Education

- Represent a Significant Component of the Lifelong Learning Process, and
- Cover a Broad Range of Content
 - -General Issues -Vocational Matters
 - -Family Literacy -Family Education
 - -Citizenship -Many Other Areas

Lifelong Learning Addresses Global Issues and Challenges

- Adult Learning & Education Equip Us With Necessary
 - -Knowledge -Capabilities -Skills
 - -Competences -Values
- To Exercise and Advance Our Rights
- To Take Control of Our Destinies
- To Build and Achieve
 - -Equity -Inclusion -Alleviating Poverty
 - -Tolerance -Sustainability -A Knowledge-Based Society

Recommendations

The Right to Education for All is Conditioned by Considerations of:

- Adult Literacy
- Policy -Governance -Financing
- Participation -Inclusion -Equity

Adult Literacy

Adult Literacy is an Indispensable Foundation

- Enabling All to Engage in Learning at Each Stage of Life
- An Essential Prerequisite for Development of Empowerment
 - Personal -Social -Economic -Political
- Building People's Capabilities to Cope with the Evolving Challenges and Complexities of
 - Life -Culture -Economy -Society

Policy

Policies and Legislative Measures for Adult Education Need to Be

- Within a Lifelong and Life-Wide Learning Perspective
 - -Comprehensive -Inclusive -Integrated
- Based on Approaches
 - -Sector-Wide -Inter-Sectoral
- Covering and Linking All Components of
 - -Learning -Education

Governance

Good Governance Facilitates Implementation of

- Adult Learning and Educational Policy in Ways which Are
 - Effective -Transparent -Accountable -Equitable
- Representation by and Participation of All Stakeholders Are Indispensable
 - Advantaged Adults -Most Disadvantaged Adults

Financing

Adult Learning and Education Represent a Valuable Investment

This Brings Social Benefits by Creating a Society
that is More

- Democratic -Peaceful -Inclusive
- Productive -Healthy -Sustainable

Participation, Inclusion and Equity

Participation, Inclusion and Equity

- Age
- Migrant Status
- Disability
- Displacement
- Sexual Identity
- Gender
- Language
- Rurality
- Imprisonment
- Sexual Orientation
- Ethnicity
- Religion
- Poverty

Quality

Quality in Learning and Education

- It is a Concept and Practice Which Is
 - -Holistic -Multidimensional
- It Demands
 - -Constant Attention -Continuous Development

Quality in Learning and Education (Continued)

Fostering a Culture of Quality in Adult Learning Requires Relevant

- Content
- Modes of Delivery
- Learner-Centered Need Assessment
- Acquisition of Multiple Competencies and Knowledge
- Professionalization of Adult Educators
- Enrichment of Learning Environments
- Empowerment of Individuals and Communities

End of Meeting Statement

As a Result of this Adult Education Conference Session, AAACE will _____



United Nations
Educational, Scientific and
Cultural Organization



confinte VI

living and learning for a viable future:
the power of adult learning

sixth international conference on adult education
belém, brazil, 1 - 4 december 2009

**Harnessing the power and potential
of adult learning and education
for a viable future**

Belém Framework for Action

Preamble

1. We, the 144 Member States of UNESCO, representatives of civil society organizations, social partners, United Nations agencies, intergovernmental agencies and the private sector, have gathered in Belém do Pará in Brazil in December 2009 as participants in the Sixth International Conference on Adult Education (CONFINTEA VI) to take stock of the progress made in adult learning and education since CONFINTEA V. Adult education is recognised as an essential element of the right to education, and we need to chart a new and urgent course of action to enable all young people and adults to exercise this right.
2. We reiterate the fundamental role of adult learning and education as laid down during the five International Conferences on Adult Education (CONFINTEA I-V) since 1949 and unanimously undertake to take forward, with a sense of urgency and at an accelerated pace, the agenda of adult learning and education.
3. We endorse the definition of adult education, first laid down in the *Recommendation on the Development of Adult Education* adopted in Nairobi in 1976 and further developed in the *Hamburg Declaration* in 1997, namely, adult education denotes "the entire body of ongoing learning processes, formal or otherwise, whereby people regarded as adults by the society to which they belong develop their abilities, enrich their knowledge, and improve their technical or professional qualifications or turn them in a new direction to meet their own needs and those of their society".
4. We affirm that literacy is the most significant foundation upon which to build comprehensive, inclusive and integrated lifelong and life-wide learning for all young people and adults. Given the magnitude of the global literacy challenge, we deem it vital that we redouble our efforts to ensure that existing adult literacy goals and priorities, as enshrined in Education for All (EFA), the United Nations Literacy Decade (UNLD) and the Literacy Initiative for Empowerment (LIFE), are achieved by all means possible.
5. The education of young people and adults enables individuals, especially women, to cope with multiple social, economic and political crises, and climate change. Therefore, we recognise the key role of adult learning and education in the achievement of the Millennium Development Goals (MDGs), Education for All (EFA) and the UN agenda for sustainable human, social, economic, cultural and environmental development, including gender equality (CEDAW and the Beijing Platform for Action)
6. We therefore adopt this **Belém Framework for Action** to guide us in harnessing the power and potential of adult learning and education for a viable future for all.

Towards Lifelong Learning

7. The role of lifelong learning is critical in addressing global educational issues and challenges. Lifelong learning "from cradle to grave" is a philosophy, a conceptual framework and an organising principle of all forms of education, based on inclusive, emancipatory, humanistic and democratic values; it is all-encompassing and integral to the vision of a knowledge-based society. We reaffirm the four pillars of learning as recommended by the International Commission on Education for the Twenty-first Century, namely learning to know, learning to do, learning to be and learning to live together.

8. We recognise that adult learning and education represent a significant component of the lifelong learning process, which embraces a learning continuum ranging from formal to non-formal to informal learning.

Adult learning and education cater to the learning needs of young people, adults and older people. Adult learning and education cover a broad range of content – general issues, vocational matters, family literacy and family education, citizenship and many other areas besides – with priorities depending on the specific needs of individual countries.

9. We are convinced and inspired by the critical role of lifelong learning in addressing global and educational issues and challenges. It is furthermore our conviction that adult learning and education equip people with the necessary knowledge, capabilities, skills, competences and values to exercise and advance their rights and take control of their destinies. Adult learning and education are also an imperative for the achievement of equity and inclusion, for alleviating poverty and for building equitable, tolerant, sustainable and knowledge-based societies.

RECOMMENDATIONS

10. While we acknowledge our achievements and progress since CONFINTEA V, we are cognisant of the challenges with which we are still confronted. Recognising that the fulfilment of the right to education for adults and young people is conditioned by considerations of policy, governance, financing, participation, inclusion, equity and quality as outlined in the annexed **Statement of Evidence**, we are determined to pursue the following recommendations. The particular challenges faced by literacy lead us to place recommendations on adult literacy to the fore.

Adult Literacy

11. Literacy is an indispensable foundation that enables young people and adults to engage in learning opportunities at all stages of the learning continuum. The right to literacy is an inherent part of the right to education. It is a prerequisite for the development of personal, social, economic and political empowerment. Literacy is an essential means of building people's capabilities to cope with the evolving challenges and complexities of life, culture, economy and society.

Given the persistence and scale of the literacy challenge, and the concomitant waste of human resources and potential, it is imperative that we redouble efforts to reduce illiteracy by 50 per cent from 2000 levels by 2015 (EFA Goal 4 and other international commitments), with the ultimate goal of preventing and breaking the cycle of low literacy and creating a fully literate world.

To these ends, we commit ourselves to:

- (a) ensuring that all surveys and data collection recognise literacy as a continuum;
- (b) developing a road map with clear goals and deadlines to meet this challenge based on the critical assessments of progress made, obstacles encountered and weaknesses identified;
- (c) mobilising and increasing internal and external resources and expertise to carry out literacy programmes with greater scale, range, coverage and quality to foster

integral and medium-term processes, to ensure that individuals achieve sustainable literacy;

- (d) developing literacy provision that is relevant and adapted to learners' needs and leads to functional and sustainable knowledge, skills and competence of participants empowering them to continue as lifelong learners whose achievement is recognised through appropriate assessment methods and instruments;
- (e) focusing literacy actions on women and highly disadvantaged populations including indigenous peoples and prisoners, with an overall focus on rural populations;
- (f) establishing international indicators and targets for literacy;
- (g) systematically reviewing and reporting progress, amongst others on investment and the adequacy of resources in literacy in each country and at the global level by including a special section in the EFA Global Monitoring Report;
- (h) planning and implementing continuing education, training and skills development beyond the basic literacy skills supported by an enriched literate environment.

Policy

12. Policies and legislative measures for adult education need to be comprehensive, inclusive and integrated within a lifelong and life-wide learning perspective, based on sector-wide and inter-sectoral approaches, covering and linking all components of learning and education.

To these ends, we commit ourselves to:

- (a) developing and implementing fully-costed policies, well-targeted plans and legislation for addressing adult literacy, education for young people and adults, and lifelong learning;
- (b) designing specific and concrete action plans for adult learning and education which are integrated into MDG, EFA and UNLD, as well as other national and regional development plans, and with LIFE activities where those exist;
- (c) ensuring that adult learning and education are included in the United Nations initiative "Delivering as One";
- (d) establishing appropriate coordination mechanisms, such as monitoring committees involving all stakeholders active in adult learning and education;
- (e) developing or improving structures and mechanisms for the recognition, validation and accreditation of all forms of learning by establishing equivalency frameworks.

Governance

13. Good governance facilitates the implementation of adult learning and education policy in ways which are effective, transparent, accountable and equitable. Representation by and participation of all stakeholders are indispensable in order to guarantee responsiveness to the needs of all learners, in particular the most disadvantaged.

To these ends, we commit ourselves to:

- (a) creating and maintaining mechanisms for the involvement of public authorities at all administrative levels, civil society organisations, social partners, the private sector, community and adult learners' and educators' organisations in the development, implementation and evaluation of adult learning and education policies and programmes;
- (b) undertaking capacity-building measures to support the constructive and informed involvement of civil society organisations, community and adult learners' organisations, as appropriate, in policy and programme development, implementation and evaluation;
- (c) promoting and supporting inter-sectoral and inter-ministerial cooperation;
- (d) fostering transnational cooperation through projects and networks for sharing know-how and innovative practice.

Financing

14. Adult learning and education represent a valuable investment which brings social benefits by creating more democratic, peaceful, inclusive, productive, healthy and sustainable societies. Significant financial investment is essential to ensure the quality provision of adult learning and education.

To these ends, we commit ourselves to:

- (a) accelerating progress towards achieving the CONFINTEA V recommendation to seek investment of at least 6% of GNP in education, and working towards increased investment in adult learning and education;
- (b) expanding existing educational resources and budgets across all government departments to meet the objectives of an integrated adult learning and education strategy;
- (c) considering new, and opening up existing, transnational funding programmes for literacy and adult education, along the lines of the actions taken under the EU Lifelong Learning Programme;
- (d) creating incentives to promote new sources of funding, e.g. from the private sector, NGOs, communities and individuals, without prejudicing the principles of equity and inclusion;
- (e) prioritising investment in lifelong learning for women, rural populations and people with disabilities.

In support of these strategies, we call upon international development partners to:

- (f) meet their commitment to filling the financial gaps that prevent the achievement of all EFA Goals, in particular Goals 3 and 4 (youth and adult learning, adult literacy);
- (g) increase funds and technical support for adult literacy, learning and education, and explore the feasibility of using alternative financing mechanisms, such as debt swap or cancellation;

- (h) require education sector plans submitted to the Fast Track Initiative (FTI) to include credible action on, and investment in, adult literacy.

Participation, inclusion and equity

15. Inclusive education is fundamental to the achievement of human, social and economic development. Equipping all individuals to develop their potential contributes significantly to encouraging them to live together in harmony and with dignity. There can be no exclusion arising from age, gender, ethnicity, migrant status, language, religion, disability, rurality, sexual identity or orientation, poverty, displacement or imprisonment. Combating the cumulative effects of multiple disadvantage is of particular importance. Measures should be taken to enhance motivation and access for all.

To these ends, we commit ourselves to:

- (a) promoting and facilitating more equitable access to, and participation in, adult learning and education by enhancing a culture of learning and by eliminating barriers to participation;
- (b) promoting and supporting more equitable access to, and participation in, adult learning and education through well-designed and targeted guidance and information, as well as activities and programmes such as Adult Learners' Weeks and learning festivals;
- (c) anticipating and responding to identifiable groups entering trajectories of multiple disadvantage, in particular in early adulthood;
- (d) creating multi-purpose community learning spaces and centres and improving access to, and participation in, the full range of adult learning and education programmes for women, taking account of the particular demands of the gender-specific life-course;
- (e) supporting the development of writing and literacy in the various indigenous languages by developing relevant programmes, methods and materials that recognise and value the indigenous cultures, knowledge and methodologies, while adequately developing the teaching of the second language of wider communication;
- (f) supporting financially a systematic focus on disadvantaged groups (for example indigenous peoples, migrants, people with special needs and those living in rural areas) in all educational policies and approaches, which may include programmes that are provided free of charge or subsidised by our governments, with incentives for learning such as bursaries, fee remission and paid study leave;
- (g) providing adult education in prison at all appropriate levels;
- (h) adopting a holistic, integrated approach, including a mechanism to identify stakeholders and the responsibilities of the state in partnership with civil society organisations, labour market stakeholders, learners and educators;
- (i) developing effective educational responses for migrants and refugees as a key focus for development work.

Quality

16. Quality in learning and education is a holistic, multidimensional concept and practice that demands constant attention and continuous development. Fostering a culture of quality in adult learning requires relevant content and modes of delivery, learner-centred needs assessment, the acquisition of multiple competences and knowledge, the professionalisation of educators, the enrichment of learning environments and the empowerment of individuals and communities.

To these ends, we commit ourselves to:

- (a) developing quality criteria for curricula, learning materials and teaching methodologies in adult education programmes, taking account of outcomes and impact measures;
- (b) recognising the diversity and plurality of providers;
- (c) improving training, capacity-building, employment conditions and the professionalisation of adult educators, e.g. through the establishment of partnerships with higher education institutions, teacher associations and civil society organisations;
- (d) elaborating criteria to assess the learning outcomes of adults at various levels;
- (e) putting in place precise quality indicators;
- (f) lending greater support to systematic interdisciplinary research in adult learning and education, complemented by knowledge management systems for the collection, analysis and dissemination of data and good practice.

Monitoring the implementation of the Belém Framework for Action

17. Drawing strength from our collective will to reinvigorate adult learning and education in our countries and internationally, we commit ourselves to the following accountability and monitoring measures. We acknowledge the need for valid and reliable quantitative and qualitative data to inform our policy-making in adult learning and education. Working with our partners to design and implement regular recording and tracking mechanisms at national and international levels is paramount in realising the Belém Framework for Action.

To these ends, we commit ourselves to:

- (a) investing in a process to develop a set of comparable indicators for literacy as a continuum and for adult education;
- (b) regularly collecting and analysing data and information on participation and progression in adult education programmes, disaggregated by gender and other factors, to evaluate change over time and to share good practice;
- (c) establishing a regular monitoring mechanism to assess the implementation of the commitments to CONFINTEA VI;
- (d) recommending the preparation of a triennial progress report to be submitted to UNESCO;
- (e) initiating regional monitoring mechanisms with clear benchmarks and indicators;

- (f) producing a national progress report for a CONFINTEA VI Mid-Term Review, coinciding with the EFA and MDG timeline of 2015;
- (g) supporting South-South cooperation for the follow-up of MDG and EFA in the areas of adult literacy, adult education and lifelong learning;
- (h) monitoring collaboration in adult education across disciplines and across sectors such as agriculture, health and employment.

To support the follow-up and monitoring at the international level, we call upon UNESCO and its structures:

- (i) to provide support to Member States by designing and developing an open-access knowledge management system to compile data and case studies of good practice, to which Member States themselves will contribute;
- (j) to develop guidelines on all learning outcomes, including those acquired through non-formal and informal learning, so that these may be recognised and validated;
- (k) to coordinate, through the UNESCO Institute for Lifelong Learning in partnership with the UNESCO Institute for Statistics, a monitoring process at the global level to take stock and report periodically on progress in adult learning and education;
- (l) to produce, on this basis, the *Global Report on Adult Learning and Education* (GRALE) at regular intervals;
- (m) to review and update, by 2012, the *Recommendation on the Development of Adult Education* adopted in Nairobi (1976).

ANNEX

Statement of Evidence

Addressing global and educational issues and challenges

1. Adult learning and education play a critical role in responding to contemporary cultural, economic, political and social challenges. Our globalised world has paved the way for many opportunities, among them the possibility of learning from rich and diverse cultures that transcend geographical boundaries. However, widening inequalities have become dominant features of our era. Much of the world's population lives in poverty, with 43.5% subsisting on less than US \$2 a day. The majority of the world's poor lives in rural areas. Demographic imbalances, with burgeoning young populations in the South and ageing populations in the North, are exacerbated by large-scale migration from poor to rich areas – within and between countries – and influxes of significant numbers of displaced people. We are confronted with unequal access to food, water and energy, and ecological degradation threatens our very existence in the long term. Alongside material privation is the all-too-frequently observed poverty of capabilities that prevents effective functioning in society. An unacceptably high number of today's children face the prospect of youth unemployment, while a growing number of socially, economically and politically "detached" young people feel that they have no stake in society.

2. We face structural shifts in production and labour markets, growing insecurities and anxieties in everyday life, difficulties in achieving mutual understanding, and now a deepening world economic and financial crisis. At the same time, globalisation and the knowledge economy force us to update and adapt our skills and competences to new work environments, forms of social organisation and channels of communication. These issues, and our urgent collective and individual learning demands, question our tenets and assumptions in this area and some aspects of the foundations of our established educational systems and philosophies.

3. In many countries, adult literacy remains a major challenge: 774 million adults (two-thirds of whom are women) lack basic literacy skills, and there is insufficient provision of effective literacy and life-skills programmes. In Europe, almost a third of the workforce has only the equivalent of lower secondary education, whereas two-thirds of new jobs require qualifications at upper secondary level or above. In many countries of the South, the majority of the population does not even attain primary school level. In 2006, some 75 million children (the majority of whom were girls) had either left school early or had never attended school. Nearly half of these children were from sub-Saharan Africa and more than 80% were rural children. The lack of social relevance of educational curricula, the inadequate numbers and, in some cases, the insufficient training of educators, the paucity of innovative materials and methods, and barriers of all kinds undermine the ability of existing educational systems to provide quality learning that can address the disparities in our societies.

4. There have been concerted international efforts to address these challenges. Progress has been made towards achieving the six Education for All (EFA) goals (2000) through government-led cooperation with United Nations agencies, civil society organisations, private providers and donors. Increasing resources for Universal Primary Education were made available through the EFA Fast Track Initiative. The United Nations Literacy Decade (UNLD) (2003-2012) provides support to achieve EFA's literacy goal through worldwide advocacy and awareness-raising. The Literacy Initiative for Empowerment (LIFE) furnishes a global framework within UNLD to support countries with the greatest literacy needs. Two of the Millennium Development Goals (2000) explicitly address education: achieving universal primary education and gender parity. However, in none of these efforts has there been a designated role for adult learning and education beyond basic literacy and life skills. Encouragingly, the Decade of Education for Sustainable Development (2005-2014) sets out a broad mandate in which adult learning and education can play a highly visible role.

5. Adult learning and education are a critical and necessary response to the challenges that confront us. They are a key component of a holistic and comprehensive system of lifelong learning and education which integrates formal, non-formal and informal learning and which addresses, explicitly or implicitly, both youth and adult learners. Ultimately, adult learning and education are about providing learning contexts and processes that are attractive and responsive to the needs of adults as active citizens. They are about developing self-reliant, autonomous individuals, building and rebuilding their lives in complex and rapidly-changing cultures, societies and economies – at work, in the family and in community and social life. The need to move to different kinds of work in the course of a lifetime, the adaptation to new contexts in situations of displacement or migration, the importance of entrepreneurial initiatives and the capacity to sustain improvements in quality of life – these and other socio-economic circumstance all call for continued learning throughout adult life. Adult learning and education not only offer specific competences, but are also a key factor in boosting self-confidence, self-esteem, a settled sense of identity and mutual support.

6. It is estimated today that for every single year that the average level of education of the adult population is raised, there is a corresponding increase of 3.7% in long-term economic growth and a 6% increase in per capita income. Nevertheless, adult learning and education are much more than an item of social spending or financial expenditure. They are an investment in hope for the future.

Progress in adult learning and education since CONFINTEA V

7. National reports submitted by 154 Member States in readiness for CONFINTEA VI and discussion on effective practice during the regional preparatory conferences have shown some progress and innovation in adult learning and education within a perspective of lifelong learning. Apart from the example of the European Union's ongoing Lifelong Learning Strategy, introduced in the year 2000, and related national policies in Member States, a few Member States in the South have introduced comprehensive adult learning and education policies and legislation, and some have even enshrined adult learning and education in their constitutions. Systematic approaches to adult learning and education, guided by policy frameworks, are being developed, and there have been instances of landmark policy reforms.

8. Literacy plans, programmes and campaigns have been reactivated and accelerated in some Member States. The period 2000-2006 saw an increase in global adult literacy rates from 76% to 84%. Progress was especially marked in the developing countries. Some governments have actively sought to work with civil society to provide non-formal learning opportunities in approaches such as *faire-faire*, with a wide range of content, objectives and target groups. The provision of non-formal education has diversified, covering topics such as human rights, citizenship, democracy, women's empowerment, HIV prevention, health, environmental protection and sustainable development. Advocacy events such as Adult Learners' Weeks and learning festivals, as well as comprehensive movements such as Learning Cities and Learning Regions, are contributing substantially to adult learning and education.

9. There have been some convincing signs and increased recognition among Member States of the benefits of gender-sensitive provision in adult learning and education, particularly with respect to women. Information and communications technologies and open and distance learning are being embraced and are slowly responding to the specific needs of learners who, until very recently, have been excluded. Mother-tongue learning is increasingly being addressed in national policies in multilingual and multicultural contexts, although only a few have implemented comprehensive policies.

10. Systems of information, documentation, monitoring and evaluation for adult learning and education programmes have been introduced. Effective instruments and systems of recognition, validation and accreditation of learning are gradually being put in place, including quality assurance bodies and procedures. Creating synergies between formal, non-formal and informal learning and education has proven to yield better results for both individual learners and education systems as existing resources and competencies are more effectively used.

11. Adult learning flourishes when states implement decisive initiatives in alliance with key civil society institutions, the corporate sector and workers' associations. Public-private partnerships are gaining currency, and South-South and triangular cooperation are yielding tangible results in forging a new form of adult learning for sustainable development, peace and democracy. Regional and supranational bodies and agencies play crucial and transformative roles, influencing and complementing states.

Challenges for adult learning and education

12. Despite this progress, the national reports and the *Global Report on Adult Learning and Education* (GRALE) produced for CONFINTEA VI show new social and educational challenges that have emerged alongside existing problems, some of which have worsened in the interim, nationally, regionally and globally. Crucially, the expectation that we would rebuild and reinforce adult learning and education in the wake of CONFINTEA V has not been met.

13. The role and place of adult learning and education in lifelong learning continue to be underplayed. At the same time, policy domains outside of education have failed to recognise and integrate the distinctive contributions that adult learning and education can offer for broader economic, social and human development. The field of adult learning and education remains fragmented. Advocacy efforts are dissipated across a number of fronts, and political credibility is diluted precisely because the very disparate nature of adult learning and education prevents their close identification with any one social policy arena. The frequent absence of adult education from the agendas of government agencies is matched by scant inter-ministerial cooperation, weak organisational structures and poor links between education (formal and non-formal) and other sectors. With regard to the recognition and accreditation of learning, both in-country mechanisms and international efforts place undue emphasis on formally accredited skills and competences, seldom including non-formal, informal and experiential learning. The gap between policy and implementation widens when policy development is undertaken in isolation, without external participation or input (from the field and institutes of higher education) and other organisations of youth and adult educators.

14. Not enough far-sighted and adequate financial planning has been established to enable adult learning and education to make telling contributions to our future. Furthermore, the current and growing trend of decentralisation in decision-making is not always matched by adequate financial allocations at all levels, or by an appropriate delegation of budgetary authority. Adult learning and education have not figured strongly in the aid strategies of international donors and have not been subject to ongoing efforts in donor coordination and harmonisation. Debt relief has not, so far, markedly benefited adult learning and education.

15. Although we are witnessing an increasing variety of adult learning and education programmes, the primary focus of such provision is now on vocational and professional education and training. More integrated approaches to adult learning and education to address development in all its aspects (economic, sustainable, community and personal) are missing. Gender mainstreaming initiatives have not always led to more relevant programmes for greater participation by women. Similarly, adult learning and education programmes are rarely responsive to indigenous people, rural populations and migrants. The diversity of learners, in terms of age, gender, cultural background, economic status, unique needs – including disabilities – and language, is not reflected in programme content and practices. Few countries have consistent multilingual policies promoting mother tongues, yet this is often crucial for creating a literate environment, especially for indigenous and/or minority languages.

16. At best referred to only in the broadest terms, adult learning and education feature sparingly in many international education agendas and recommendations, and are often viewed as a synonym for basic literacy acquisition. Yet literacy is indisputably of immense consequence, and the persistently vast scale of the literacy challenge presents an indictment of the inadequate adoption of the measures and initiatives launched in recent years. Consistently high illiteracy rates

question whether enough has been done politically and financially by governments and international agencies.

17. The lack of professionalisation and training opportunities for educators has had a detrimental impact on the quality of adult learning and education provision, as has the impoverished fabric of the learning environment, in terms of equipment, materials and curricula. Only rarely are needs assessment and research conducted on a systematic basis in the planning process to determine appropriate content, pedagogy, mode of delivery and supporting infrastructure. Nor are monitoring, evaluation and feedback mechanisms a consistent feature of the quality landscape in adult learning and education. Where they do exist, their levels of sophistication are subject to the tension of balancing quality against quantity of provision.

18. This **Statement of Evidence** provides the underpinning rationale for the recommendations and strategies as outlined above in the **Belém Framework for Action**.

Henschke, J. A. (2010). "Bringing Together Personal Learning, Higher Education Institutional Elements, and Global Support for a Re-Orientation toward a Focus on Lifelong Learning and Education" In *Encyclopedia for Using Technology in Adult and Career Education*. Wang, V., [Ed]. IGI Global, Hershey, PA. June, 2010.

Bringing Together Personal Learning, Higher Education Institutional Elements, and Global Support for a Re-Orientation toward a Focus on Lifelong Learning and Education

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Abstract

This extended research study focused on bringing together personal learning, higher educational institutional elements to be considered for helping higher educational institutions and individual learners in various countries to re-orient themselves toward a focus on lifelong learning, and placing this within the support and context of lifelong learning and education around the globe. Research is presented on the background and experiences of various higher educational institutions and individual learners in this regard, developing a tentative policy statement and identification of the elements of a re-orientation toward lifelong learning focus as products of several worldwide conferences. In addition, the support of UNESCO in its global reach encourages this to move forward rapidly into the future.

Introduction

Higher education institutions around the world in the 21st century are being faced with serving the educational and learning needs of a non-traditional population [older than the traditional college age of 18-22]. This new population requires different approaches for fulfilling their educational desires. Their individual abilities in lifelong learning influence how they enact learning. They come into the higher education setting on a part time basis, study and take courses for a period of time, and then drop out for a while. They return later, seeking to 'pick up' their course of study again where they were when they were previously enrolled. The institutions have to deal with shifting populations, learning needs, how to work in these situations, and placing this within a global context of supporting lifelong learning and education.

Background and Research Design

This extended research focused on bringing together personal learning, higher education institutional elements to be considered for helping higher educational institutions and individual learners in various countries to re-orient themselves toward a lifelong learning focus, and placing this within the support and context of lifelong learning and education around the globe. This global support was especially prominent from the United Nations Education, Scientific and Cultural Organization (UNESCO). Some Adult Educators at the University of Missouri — St. Louis (UMSL) were involved in researching the background of this topic on the North American Continent and the Northern Hemisphere. Other Adult Educators at The University of The Western Cape [UWC], Cape Town, South Africa were involved in researching the background of this topic on the African Continent and the Southern Hemisphere (Flint, et al., 1999; *Serving Adult Learners...*, 2000; Wood, 2001; Walters, n.d.; Walters & Volbrecht, n.d.).

This information was shared as one backdrop for a worldwide conference on the topic of "Lifelong Learning, Higher Education and Active Citizenship" held in Cape Town in October, 2000. There were 95 Adult Educators from 19 countries at the conference. This was also a

follow-up and continuation of the work begun at the UNESCO Fifth International Conference on Adult Education [CONFINTEA V] in Hamburg, Germany, 1997 (Agenda..., 1997), continued at the University of Mumbai, India in 1998 (Mumbai Statement..., 1998), and the UNESCO World Conference on Higher Education in Paris in 1998.

These gatherings of adult educators resulted in the formulation of The Cape Town Statement on Characteristic Elements of a Lifelong Learning Higher Education Institution (2001). They named six major elements. The next step in the process saw the two schools from South Africa and The University of Missouri, changing those six elements to seven major elements, and developing measurable performance indicators [MPI] for the practice of lifelong learning in higher education institutions.

A five member team from The University of Missouri [UM] went to Cape Town to work with personnel from The University of The Western Cape [UWC] in May, 2001. The aim and task of this meeting was to address the issue of moving a higher education institution moving from a traditional orientation toward a lifelong learning orientation. They developed Measurable Performance Indicators [MPI] for tracking the progress of any educational institution in the direction of Lifelong Learning. This information also applies to the educational function of other institutions as well. This coming together of adult educators two different times resulted in the formulation of the Cape Town Statement on Characteristic Elements of a Lifelong Learning Higher Education Institution, and the MPI. The six [and ultimately seven] elements included: [1] Overarching Frameworks, [2] Strategic Partnerships, [3] Research, [4] Teaching and Learning Processes, [5] Administration Policies and Mechanisms, [6] Decision Support Systems, and, [7] Student Support Systems and Services.

An additional study adds some perspective on the responsibility of the learner in developing and maintaining an orientation toward lifelong learning. Li [2005] presented her findings on a system of lifelong learning at the Commission on International Adult Education [CIAE] Pre-Conference of the American Association for Adult and Continuing Education, Pittsburgh, PA. Her system is narrowly focused on the learner and does not take into account what an educational institution may need to do to be supportive in the process of helping the learner maintain a lifelong learning orientation.

However, taken from the institutional perspective of moving toward supporting a comprehensive system of lifelong learning and education, United Nations Educational, Scientific and Cultural Organization [UNESCO] Education Sector (Quality Education..., November, 2008) organized four major conferences on education, with twenty regional and sub-regional conferences and meetings convened to prepare for these world conferences and the related documents that resulted from them. The four conferences focused on a comprehensive vision of quality education, equity and sustainable development. The four conferences included one in higher education, and are as follows: (1) The 48th International Conference on Education – *Inclusive Education: the Way of the Future*, 11/2008, Geneva, Switzerland; (2) The World Conference on Education for Sustainable Development – *Moving into the Second Half of the UN Decade*, 3-4/2009, Bonn, Germany; (3) The 2009 World Conference in Higher Education – *The New Dynamics of Higher Education and Research for Societal Change and Development*, 7/2009, Paris, France; and, (4) Sixth International Conference on Adult Education-CONFINTEA

VI – *Learning and Living for a Viable Future: the Power of Adult Learning*, 12/2009, Belem, Para, Brazil.

Some of the important changes that occurred during the development of the process of the higher education re-orientation toward lifelong learning are included. However, this is not limited to the following definition and good faculty practices.

Developing a Life Long Learning Definition

A master concept or principle regarded as the continuous and never complete development, changes, and adaptation in human consciousness that occur partly through deliberate action but even more as a result of the business of living, where learning may be intentional or unintentional that includes acquiring greater understanding of other people and the world at large, based on six pillars of learning: learning to live together, learning to know, learning to do, learning to be, learning to change, and learning for sustainable development (Henschke, 2000, 2006, 2009a; Delors, 1998).

Faculty Development of Good Practices Oriented Toward Understanding and Helping Adults Learn

Maehl (2000) developed a somewhat comprehensive perspective on faculty development in this regard, He garnered this from observing the practices and experiences of 34 higher education institutions. There were six elements in his estimation, and they follow.

1. Determining learner needs

- assessed carefully
- addressed
 - fairly &
 - equitably

2. Adult learning programs

- arise from needs assessment
- planned to accomplish learner outcomes

3. Adult learning experiences

- high quality
 - positive learning environment
 - flexibility
 - adaptability
 - mutual respect between
 - teacher &
 - learner
- adult learner-centered
 - encouraging a positive psychological environment by learning

- allowing learner participation in the design of experiences
- relating learning to learner's
 - prior experience &
 - application
- using varying types of learning techniques
- recognizing & addressing different learning styles
- providing continuous feedback to learners
- arranging appropriate physical settings

4. Adult learning assessment

- outcome based
- (designed to evaluate participants' previous learning
 - formal or
 - informal

5. Faculty and staff needing

- to be adequately prepared to work with adult learners by
 - participating in faculty development learning experiences &
 - keeping abreast with the current literature and research in how to help adults learn
- to participate in ongoing evaluations and development of their own capabilities in six major building blocks of
 - beliefs and notions about adults learners
 - perceptions concerning qualities of effective teachers
 - ideas of the phases and sequences in the learning process
 - teaching tips and learning techniques
 - implementing the prepared plan
 - cultural and contextual awareness
- to articulate and clarify their own teaching philosophy regarding adult learners

6. Programs for adult learners having

- clearly stated missions
- sufficient resources to carry out their missions
 - rigorous financial administration that supports the adult, lifelong learning mission
 - necessary services for
 - learning &
 - student support
 - policies governing
 - learner confidentiality &
 - other matters
 - ethical standards for
 - learner recruitment &
 - professional practice

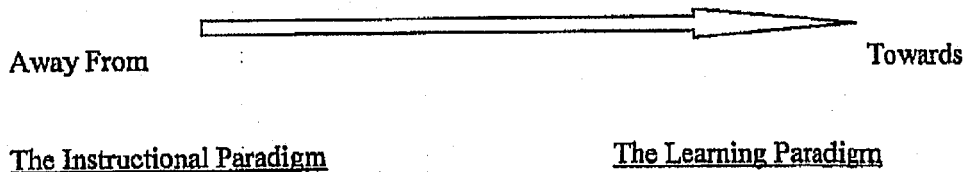
7. Identifying Characteristics of Highly Effective Adult Learning Programs

Characteristics of Highly Effective Adult Learning Programs are clearly delineated by a major piece of research (Billington, 1988, 2000; Henschke, 1987, 2000). It was as though this research snapped multiple pictures of a barely visible phenomenon from various angles, and when developed, all pictures revealed the same clear image. Results revealed that adults can and do experience significant personal growth at midlife. However, adult students grew significantly only in one type of learning environment; they tended not to grow or to regress in another type. What was the difference? The seven key factors found in learning programs that stimulated adult development are:

- 1) An environment where students feel safe and supported, where individuals needs and uniqueness are honored, and where abilities and life achievements are acknowledged and respected.
- 2) An environment that fosters intellectual freedom and encourages experimentation and creativity.
- 3) An environment where faculty treats adult students as peers-accepted and respected as intelligent experienced adults, whose opinions are listened to, honored, and appreciated. Such faculty members often comment that they learn as much from their students as the student learn from them.
- 4) Self-directed learning, where students take responsibility for their own learning. They work with faculty to design individual learning programs which address what each person needs and wants to learn in order to function optimally in their profession.
- 5) Pacing or intellectual challenge. Optimal pacing is challenging people just beyond their present level of ability. If challenged too far beyond, people give up. If challenged to little, they become bored and learn little. Pacing can be compared to playing tennis with a slightly better player; your game tends to improve. But if the other player is far better and it's impossible to return a ball, you give up overwhelmed. If the other player is less experienced and can't return one of your balls, you learn little. Those adults who reported experiencing high levels of intellectual stimulation – to the point of feeling discomfort—grew more.
- 6) Active involvement in learning, as opposed to passively listening to lectures. Where students and instructors interact and dialogue, where students try out new ideas in the workplace, and where exercises and experiences are used to bolster facts and theory, adults grow more.
- 7) Regular feedback mechanisms for students to tell faculty what works best for them and what they want and need to learn—and faculty who hear and make changes based on student input.

8. Changing Faculty Roles

Emphasis on changing faculty roles focused on moving according to the following paradigm (Lemkuhle, 2000; Henschke, 2000):



Learning Theory

- > Knowledge existing 'out there'
- > Knowledge coming in 'chunks' & 'bits' delivered by instructors
- > Learning as cumulative and linear
- > Fits the 'storehouse of knowledge' metaphor
- > Learning as teacher-centered
- > Learning as teacher controlled
- > 'Live' teacher, 'live' students required
- > The classroom and learning are competitive and individualistic
- > Talent and ability are rare
- > Knowledge existing in each person's mind & being shaped by individual experience
- > Knowledge being constructed, created, and internalized
- > Learning as a nesting & interacting of frameworks
- > Fits the 'learning how to ride a bicycle' metaphor
- > Learning as student-centered
- > Learning as the students' responsibility
- > 'Proactive' learner required with teaching resources accessible
- > Learning environments and learning are cooperative, collaborative & supportive
- > Talent and ability are abundant

Productivity/Funding

- > Definition of productivity as instructing the unlearned
- > Cost per hour of instruction per student
- > Funding for hours of instruction
- > Definition of productivity as helping adults learn
- > Cost per unit of learning per student
- > Funding for learning outcomes

Nature of Roles

- > Faculty as authoritarian experts
- > Faculty as primarily lecturers
- > Faculty as models exemplifying lifelong learning
- > Faculty as primarily designers & implementers of adult learning techniques & environments

- >Faculty and students acting independently and in isolation
- >Faculty and students working in teams with each other and with other staff
- >Teachers classifying and sorting students
- >Teachers helping develop every student's competencies and talents
- >Staff serving/supporting faculty and the process of instruction.
- >All staff as educators who help produce student learning and success
- >Any expert can teach
- >Empowering learning through challenging and complex means
- >Line governance; independent actors
- >Shared governance, teamwork

The Measurable Performance Indicators

The background of research on Lifelong Learning (LLL) resulted in a practical measurement system for indicating whether a higher educational institution is moving in that direction. One of the major trends in LLL focuses on Performance Indicators (PI) that requires the characteristic elements to be measurable and concrete in action (Henschke, 2000; Taylor, et al, 2000). It is well to note that moving higher educational institutions toward serving the needs of all lifelong learners is a lifelong endeavor that will continue for many years. The discussions between the University of Missouri [UM] Team and The University of The Western Cape [UWC] Personnel modified the original six (6) "Characteristic Elements" into seven (7). The seventh one that was added to the original six was "Decision Support Systems. A few accompanying "Measurable Performance Indicators" [MPI] are indicated in the list that follows. The complete MPI Instrument is available from the author by request from the following e-mail: jhenschke@lindenwood.edu

- (1) Overarching Frameworks — provide the context that facilitates operation as a lifelong learning institution. This would mean that all stakeholders relating to the institution have a financial policy and implementation plan, the legal framework, and the cultural/social sensitivity as a foundation to operating the institution for serving lifelong learners.
- (2) Strategic Partnerships & Linkages — form collaborative relationships internationally, with other institutions nationally, and with other groups in society. The indicators needed will focus on increasing the institution wide concern with promoting and increasing the number and quality of partnerships across multiple departmental, institutional, national, and international boundaries. Decisions regarding choice of programmes, assessment of learning outcomes, curriculum design and methods are a shared responsibility based on collaborative processes among academic staff, service staff and learners.
- (3) Research — includes working across disciplines, institutions, investigating what kinds of institutional adjustments need to be made to help the institution better serve lifelong learners: i.e. convenience, transportation, child care services, locations of offerings, library accessibility, computer and website services, etc. In addition, targets are set for increasing and encouraging a broader range of research paradigms: action research, case studies, story telling, etc.
- (4) Teaching & Learning Processes — Educators will need to move their teaching and learning processes away from the "instructional paradigm" toward the "learning paradigm," thus encouraging self-directed learning, engaging with the knowledges, interests and life situations which learners bring to their education, and using open and resource based learning approaches. They will need to use different teaching methods that respond to the diverse learning styles of lifelong learners, including CO-learning, interactive learning, and continuous learning while integrating appropriate technology. The learners and faculty will need to mutually design individual learning programs that address what each learner needs

and wants to learn in order to function optimally in their profession. This all means that the institution plans to employ and develop faculty who see their primary roles as facilitators of the learning process as opposed to dispensers of information, thus moving their development toward: knowing as a dialogical process; a dialogical relationship to oneself; being a continuous learner; self-agency and self-authorship; and connection with others.

- (5) Administration Policies & Mechanisms — service to learners is the top priority of the administration. The mission statement and allocation of resources, including staffing is increased to reflect the institutional commitment for operating a lifelong learning institution. The operational system is imbued with a belief that demonstrates active and systematic listening turned into responsiveness to meet needs of lifelong learners. Registration, class times, and courses — including modular choices and academics support — are available at times and in formats geared to the convenience of learners.
- (6) Decision Support Systems — provide within the institution and community an atmosphere that is people-centered, caring, warm, informal, intimate and trusting. It also maintains a demographic profile on programs aimed at increasing the numbers of: students served, courses offered, locations of offerings, and contracts for educational programs with different organizations.
- (7) Student Support Systems & Services — provides learner-friendliness, convenient schedules, and in various ways encourages independent learning. Obligations and responsibilities of the learners, educational providers and administration service are made clear from the beginning. A more extensive explanation of number four [4] above is included on the topic above. It is on the teaching and learning process.

The Teaching and Learning Process

- *Educators encourage self-directed learning; engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches.*
- *The institution provides a central infrastructure in the form of Libraries services, informational support and personnel necessary for lifelong learners.*
- *Self-directed learning (SDL) is one of the highly effective characteristics of Lifelong Learning (LLL). SDL is where students take responsibility for their own learning. They work with faculty to design individual learning programs that address what each person needs and wants to learn in order to function optimally in their profession..*
- *Active involvement in learning – opposed to passively listening to lectures, where students and instructors interact and dialogue, where students try out new ideas in the workplace, where exercises and experiences are used to bolster facts and theory – helps adults grow more..*

Institution role – *Plans exist to employ and develop faculty who see their primary roles as facilitators of the learning process as opposed to dispensers of information.*

1. The institution employs faculty who do not limit themselves to the traditional role of lecturer in the classroom, and may perform in blended roles that include administrative duties, advising, teaching and facilitating. [Council for Adult & Experiential Learning (CAEL)]
2. The institution engages all learners in a thorough process of education and career planning to determine their level of educational development upon entry, their educational and career goals, and a plan for reaching these goals as efficiently as possible.
3. Number of credits awarded for Recognition of Prior Learning (RPL) / Alternative missions and life experiences are increased by a certain percentage within a specified time period.
4. The institution is supportive of staff development.
5. The institution supports on-going summative evaluations at the end of the modules for the improvement of instruction and for the benefit of learners.
6. Up-to-date records are kept of enrollment and throughput of adult learners.

7. Content of the lecturer development needs to be oriented toward facilitation of LLL.
8. The institution approves and certifies a variety of instructional delivery systems.
9. The institution provides an atmosphere that is people-centered, caring, warm, informal, intimate, and trusting.

Educator role

- *The educator should understand and reflect the values of the mission in curriculum design and delivery.*
 - *Educators will respond to the needs of students who enter alternative admissions policy.*
 - *An environment is needed where faculty treats adult students as peers – accepted and respected as intelligent, experienced adults whose opinions are listened to, honored, and appreciated.*
 - *The educators are encouraged to use different teaching methods and techniques to respond to the diverse learning styles of LLLs including co-learning, inactive learning, and continuous learning while also integrating appropriate technology.*
10. Educators and tutors demonstrate competencies as lifelong learners' effective learner-centered instruction.
 11. An environment is provided where faculty treats adult students as peers—accepted and respected as intelligent experienced adults whose opinion are listened to, honored, and appreciated.
 12. Educators will improve their own competencies in LLL.
 13. Educators will offer themselves to the students as exemplifying a model of LLL.
 14. The curriculum is developed so that traditionally marginalized social groups inside and outside the institution can be full participants.
 15. Assessment is conducted in various forms and used to improve the quality of learning in LLLs.
 16. Educators optimally pace and challenge the learners' intelligence just beyond their present learning abilities.

Learner role

17. Learners provide the faculty with relevant information so they can assess educational development and convey credit where appropriate.
18. Learners engage actively in the process of learning.
19. Learners perceive that their individual needs and uniqueness are respected.
20. Learners perceive that their abilities and life achievements have been acknowledged and respected in the classroom.
21. Learners are engaged in a self-assessment process for determining readiness for self-direction in carrying out their LLL.
22. Learners will engage in Self-Directed Learning (SDL).
23. Learners will seek intellectual challenge.
24. Learners will engage actively with the lecturer and other students.
25. Learners will pursue intellectual freedom, experimentation and creativity.
26. Learner expects to be treated as an intelligent adults whose opinions are listened to, honored, and appreciated.

It is obvious that the internal structure of this educational system on re-orientation toward lifelong learning is focused on the interaction between the institution and the learner. Each has a part in making the system work and accomplishing the goals of the system.

All of the above within the Measureable Performance Indicators comes very close to what Knowles (1990, 1995) and Henschke (2009b, 2010) explained as the element of andragogy which means 'the art and science of helping adults learn'. Although much of what is referred to pertains to adults, this foundation adds extensively to what may be seen as relating to human beings in general regarding their learning. This also is reflective of Kohl's (2000) and Smith's (1998) work in lifelong learning, and Taylor, et al. (2000), on the competency requirements for educators of adults.

Another Indicator System of Lifelong Learning

An additional study adds some perspective on the responsibility of the learner in developing and maintaining an orientation toward lifelong learning. Li [2005] presented her findings on a system of lifelong learning at the Commission on International Adult Education [CIAE] Pre-Conference of the American Association for Adult and Continuing Education, Pittsburgh, PA. Lifelong learning literacy in her study is defined as having the skills/abilities to continue learning throughout the lifespan—knowledge, skills and attitudes we need to be developing from childhood. It seldom finds the term lifelong learning literacy in the literature. However, being aware of lifelong learning and possessing the competence of lifelong learning are keys to future success. Therefore, the term is meaningful and deserves full attention. The research looked at lifelong learning literacy from the perspectives of lifelong learning abilities/competences, the characteristics of lifelong learners, and self-directed learning to formulate the research framework.

This research was intended to find out the contents of lifelong learning. The Delphi Method was used with 30 research targets who are either scholars who have had in-depth researches on lifelong learning, people who actually work in the field of lifelong or exemplary lifelong learners. In the contents of the indicator system, the input-process-output (IPO) model was applied to cover the three aspects of cognition, skill/knowledge and attitudes and to establish a system of lifelong learning literacy

Li's (2005) system is narrowly focused on the learner and does not take into account what an educational institution may need to do to be supportive in the process of helping the learner maintain a lifelong learning orientation. The structure of her indicator system is composed of three tiers: domains, dimensions and indicators. There are three domains, including learning input [LI], learning process [LP], and learning output [LO]. The LI consists of three dimensions: self-awareness, learning awareness, and basic cognitive concepts. The LP includes four dimensions: learning strategies and methods, pursuit and integration of learning resources, learning time planning / management, and team learning. The LO takes into account the final two dimensions: learning evaluation, and learning transfer. The paper provides the definitions of the domains, and fully describes and explains as the indicators, the meaning of each dimension which are the labels of very specific indicators. Details of the three tiers of this indicator system [domains, dimensions, and indicators] are provided below.

Planning Structure of the Indicator System

Three [3] Tiers:

- Domains
- Dimensions
- Indicators

First Tier: Domains -- 3 Definitions

1. **Learning Input [LI]** – means the correct understanding about lifelong learning and the readiness for lifelong learning. Only when an individual has

a positive attitude toward learning and is ready for learning, is he or she willing to invest time in learning continuously.

2. **Learning Process [LP]** – in the learning process an individual acquires the ability of lifelong learning, including learning strategies and methods, pursuit and integration of learning resources, learning time planning/management, and team learning.
3. **Learning Output [LO]** – an individual enjoys lifelong learning and is able to self-evaluate learning status, including learning evaluation and learning transfer.

Second Tier: Dimensions – 9

- **LI – Learning Input**
 - 1) Self-Awareness
 - 2) Learning Awareness
 - 3) Basic Concepts
- **LP – Learning Process**
 - 4) Learning Strategies and Methods
 - 5) Pursuit and Integration of Learning Resources
 - 6) Learning Time / Planning and Management
 - 7) Teaming Learning
- **LO – Learning Output**
 - 8) Learning Evaluation
 - 9) Learning Transfer

Third Tier: Indicators – 9

Provides Further Descriptions of Each Specific Indicator in Each Dimension

(A) LEARNING INPUT

1. Self-Awareness – the ability to know one's

- Interests
- Attitudes
- Abilities
- Needs

and appreciate the importance of

- Self-Recognition
 - Self-Realization
- also (in the Learning Process) of great importance is
- Personal Recognition of Subjectivity

five indicators

- understanding his/her own interests, attitudes or abilities
- awareness of the importance of self-recognition and self-achievement
- understanding his/her potential and developing suitable habits
- positive self-recognition and self-discipline
- having high persistence

2. Learning Awareness – the ability to

- Recognize the meaning and importance of lifelong learning abilities
- Set learning goals
- Further develop learning plans based on personal needs

six indicators

- able to find motivations for participation and learning
- understanding the necessity of participating in learning activities
- strong awareness of the connections between lifelong and daily life
- understanding his/her own personal learning type
- able to make learning plans based on his/her own needs
- able to set his/her learning objectives

3. Basic Cognitive Concepts – the basic abilities of

- listening
- speaking
- reading
- writing
- concept formation
- abstract thinking

these are basic personal cognitive abilities for learning activity participation.

three indicators:

- having basic proficiencies of / abilities of
 - listening
 - speaking
 - reading
 - writing
- having the abilities to apply mathematic
 - concepts
 - skills
- having the abilities of
 - concept formation
 - abstract thinking

(B) LEARNING PROCESS

4. Learning strategies and methods – an individual can use effectively in learning activities

- methods used to promote understanding
- learning and memorizing new knowledge to fulfill personal learning goals

eight indicators – including able to

- detect and distinguish the emotions, intentions, motivations and feelings of others
- effectively use all kinds of resources to make learning plans
- select suitable information and services to facilitate the implementation of learning plans
- use memory strategies
- use creativity and imagination to solve problems

- achieve learning objectives through the process of self-decision-making, problem solving and planning
- systematically analyze the known and unknown parts of problems
- adapt to different environments and use different learning skills.

5. Pursuit and integration of learning resources -- abilities of individual learners to

- collect and analyze information
- make critical judgments
- use and integrate resources in the process of learning

In this society of information explosion, each individual should learn how to

- collect data
- analyze information
- to find out helpful data
- further used and organize the data

Many scholars also regard information literacy as one of the abilities required for development of

life-long learning skills.

six indicators-- including able to

- collect and analyze data
- to use IT tools and technologies
- use resources to make analysis and judgment and to integration learning information
- use the information searching functions of different kinds of media
- able to find, select, evaluate, organize, use and create information
- overcome learning difficulties based on personal learning resources.

6. Learning time planning/management

- the skills of time management of a learner
- in the learning process
- in order to guide and arrange his/her personal learning activities
- to use free time reasonably and effectively

four indicators -- including able to

- do effective time management and use it in daily life
- keep regular learning activities and good physical conditions
- fully use learning skills to arrange learning plans,
- plan learning participation early and implement personal learning plans

7. Team learning

- the sharing of learning results
- collaboration of individual learners with others
- to fulfill tasks in the learning process

In the society of life-long learning, team learning will be

- an irreversible trend
- an important ability for learners to learn
 - how to work with others in a team
 - accept the common goals of the team

- in order to complete the common learning tasks

three indicators -- including able to

- communicate and cooperate with others
- clearly express himself or herself and share experiences with others
- discuss learning objectives and cooperate with others to complete the tasks

(C) LEARNING OUTPUT

8. Learning evaluation -- the ability to effectively evaluate one's performance in learning activities.

four indicators -- including able to

- self-evaluate learning efficiency
- design creative learning activities in the future
- use learning results to improve future learning quality
- have reflective learning and thinking on this learning event.

9. Learning transfer -- the ability to effectively apply what one has learned to related contexts in daily life.

five indicators -- including able to

- use what he or she has learned in future planning
- use what he or she has learned in future planning
- use the learned skills and knowledge at work
- use the learned knowledge to promote family harmony
- use the learned knowledge to help community building development

In this system, the sole responsibility is upon the learner. In addition, it is much more detailed, than the previous system, on the perspective of the learner regarding what the learner needs to do, and the learners' responsibility in the learning process. It is not related to anything that an educational institution would have to do with the learning process.

Updates and Follow-Through on The Cape Town Statement and Implementing the "Measurable Performance Indicators" into Various Institutions

In 2002, John A. Henschke was instrumental in enlisting two people he knew and had worked with to translate the Cape Town Statement into two other languages beside English. Dr. Eihab Abou-Rokbah, a Saudi Arabian Ph. D, graduate from the University of Missouri - St. Louis, translated it into the Arabic language. Ms. Wang Yan, Director of the International Educational Programs at the Beijing [Peoples' Republic of China] Academy of Educational Sciences translated it into the Mandarin Chinese language. These are being used in the countries where these languages are spoken in conjunction with the efforts of the UNESCO Institute of Education [UIE].

In September, 2003, a six-year review on the UNESCO Institute of Education [UIE] 1997 Hamburg, Germany CONFINTEA V Conference was held in Bangkok, Thailand. The

"measurable performance indicators" [MPI] for characteristic elements of a lifelong learning higher education institution were distributed and discussed among the eighteen [18] representatives of the participating institutions. The MPI have also been shared and presented at numerous adult education conferences in the USA and internationally.

In addition, Barnes, Jewish, Christian [BJC] Health System in St. Louis, MO [the fourth largest health care system in the USA] adopted the MPI as the standard toward which the institution will move itself in re-orienting their focus. In 2004, Dr. Susan Isenberg, a Ph. D. graduate from University of Missouri - St. Louis, and Director of the Center for Training and Development, a BJC Center for Lifelong Learning at Christian Hospital, implemented adult learning principles [andragogical] and the MPI into their institutional operation. They developed "Strategic Plan 2004" with the vision to be recognized as a magnet lifelong learning center by 2009. The Strategic Plan includes four [4] major components: Demonstrate Excellent Customer Service, Demonstrate Teamwork to Earn Each Other's Trust, Create a Change Welcoming Healthy Work Culture, and Be Financially Responsible (Strategic Plan..., 2004).

The reflection of this BJC Strategic Plan moving forward is depicted in additional documents entitled: "Operational Plan," "GAP Plan," and "Action Plan." Results from the first year of implementing the Strategic Plan included the following new things: Place, name, responsibilities, programs, partnerships, and attitude. The second year results instituted: An e-learning center, online registration, Wound Center, Diabetes Center, six [6] promotions to leadership positions of the original twelve [12] staff. In addition, Dr. Isenberg has been promoted to a new staff position [reporting to the President], that will oversee the development of the Christian Hospital in accordance with the adult learning [andragogical] principles and the Measurable Performance Indicators [MPI], thus connecting these with Corporate Profitability (Action Plan..., 2004; Gap Plan..., 2004; Operational Plan..., 2004).

In the 2002 annual report of the Division of Lifelong Learning (2002) at The University of The Western Cape [UWC] in South Africa, they posted their progress regarding key performance areas of lifelong learning: Recognition of Prior Learning [RPL], advocacy for a lifelong learning orientation, workplace learning and continuing education, part-time studies, and lifelong learning research and teaching. By 2003 the UWC Senate decided to adopt a thematic approach to monitoring the lifelong learning mission at UWC.

The theme for 2004 at UWC (Monitoring..., 2001) was on accredited part-time studies, in which they also developed the substantially revised fourth edition of "Juggling to Learn" (2005), which is a handbook for students, educators and administrators in the UWC part-time programme. The aim of this document is to improve the quality and success of part-time provision at UWC by: [1] Providing suggestions for getting started in the programme; [2] Giving information on useful services; [3] Giving tips on learning and teaching; and, [4] Communicating the protocol and encouraging its implementation. In 2005, progress on lifelong learning had materialized to the point that UWC made reports on recognizing prior learning (The University..., 2005), equity and access for adult learners and workers (Equity, access..., 2005), and, profiles of success (Profiles of Success..., 2005).

Helping to Reorient Higher Education in the First Decade of the 21st Century

Strategic support from UNESCO was forthcoming. Through the numerous conferences they convened, national reports they received upon request, and action documents they facilitated in helping produce, the strong emphasis was to encourage the shift of higher education institutions away from a traditional educational approach and toward an orientation of lifelong learning and education (Boucouvalas, 2009; GRALE, 2009; Harnessing the power..., 2009; Quality education...,2008).

Since 1949, UNESCO has convened Six International World Conferences in Adult Education (named CONFINTEA): one conference every 12 years [1949 – Elsinore, Denmark; 1960 – Tokyo, Japan; 1972 – Montreal, Canada; 1985 – Paris, France; 1997 – Hamburg, Germany; 2009 – Belem, Para, Brazil]. Each of them in one way or another made a contribution toward what is now a worldwide concern with lifelong learning and education.

During 2008 and 2009 there were 23 related and preparatory conferences and meetings leading up to the Belem CONFINTEA VI (Quality education..., 2008). UNESCO’s Medium Term Strategy 2008-2013 reads on lifelong learning as follows:

Development and economic prosperity depend on the ability of countries to educate all members of their societies and offer them lifelong learning. An innovative society prepares its people not only to embrace and adapt to change but also to manage and influence it. Education enriches cultures, creates mutual understanding and underpins peaceful societies. (p. 3)

At the 2009 World Conference in Higher Education, emphasis was placed on Higher Education promoting ethical values and attitudes among students that solidifies learning throughout life in fulfilling their responsibility toward society and their sensitivity to local, national and global realities. Following the conference title ‘The new dynamics of higher education and research for societal change and development’ the major themes were on: internationalization, regionalization and globalization, equity, access and quality, learning, research and innovation. Very clearly articulated was higher education’s role in addressing major global challenges like sustainable development, education for all, and poverty eradication, which will require them to be in a mode of lifelong learning and education (Quality education..., 2008).

Boucouvalas (2009) in reporting her reflections about the UNESCO World Conference on Higher Education [WCHE], indicated that there appeared to be a movement of higher education toward resonance with the theory and practice that adult education has embraced for decades. This included concepts of lifelong learning, learner-centered approaches, learning how to learn, critical consciousness, recognition of non-formal and informal learning, participatory research, marginalized and disadvantaged groups, self-managed learning, and transformational learning. She offered the observation that it may be meaningful to build bridges between higher education and adult education.

The WCHE adopted a Communique at the final plenary session which was included in Boucouvalas' (2009) report. There were two major statements [items 18 and 21, both on page 18 of her report] pertaining to higher education's responsibility relating to lifelong learning. The first item is regarding the training offered by higher education.

The training offered by institutions of higher education should both respond to and anticipate societal needs. This includes promoting research for the development and use of new technologies and ensuring the provision of technical and vocational training, entrepreneurship education and programmes for lifelong learning. (Item # 18)

The second item in the WCHE Communique regarding higher education's responsibility for lifelong learning is on the topic of the quality of overall objectives.

Quality criteria must reflect the overall objectives of higher education, notably the aim of cultivating in students critical and independent thought and the capacity of learning throughout life. They should encourage innovation and diversity. Assuring quality in higher education requires recognition of the importance of attracting and retaining qualified, talented and committed teaching and research staff. (Item # 21)

The Global Report on Adult Learning and Education [GRALE] (2009) was generated by UNESCO based on the requested national reports which they received from 154 UNESCO Member States on the state of adult learning and education, and five Regional Synthesis Reports and secondary literature. These reports were provided preparatory to CONFINTEA VI, held December 1-4, 2009, in Belem, Para, Brazil. GRALE indicates the need to situate adult education within a lifelong learning perspective and a capability approach. This underscores and reiterates what each of the previous five CONFINTEA Conferences has also emphasized.

The Belem Framework for Action is the Official Document that resulted from CONFINTEA VI. It is entitled: Harnessing the power and potential of adult learning and education for a viable future (Harnessing the power..., 2009). It was adopted by the Member Nations at the final plenary session of UNESCO CONFINTEA VI, December 4, 2009. It will help guide adult learning and education [including higher education] in the next 12 years around the globe. It is appropriate to include a final quote from that document on lifelong learning.

The role of lifelong learning is critical in addressing global and educational issues and challenges. Lifelong learning "from cradle to grave" is a philosophy, conceptual framework and an organizing principle of all education, based on inclusive, emancipatory, humanistic, democratic values, all-encompassing and with the vision of a knowledge-based society. We reaffirm the four pillars of learning as recommended by the International Commission of Education for the 21st Century; namely learning to know, learning to do, learning to be, learning to live together. (p. 2)

Conclusion

Research on the movement of Higher Education away from a traditional educational approach toward a lifelong learning orientation has been transpiring over a period of more than 12 years. Much of the original impetus came as a result of the collegial working relationship between The University of The Western Cape (UWC) in Cape Town, South Africa, and The University of Missouri System in the USA. A foundation was laid between the Northern Hemisphere and the Southern Hemisphere, represented by these two institutions and their connections with wider bodies of literature and the United Nations Education, Scientific and Cultural Organization (UNESCO). A definition of lifelong learning was developed, and then best practices of faculty for helping adults learn were identified. This was implemented into indicators for performance to most helpful to realize lifelong learning in the constituents. Another lifelong learning system was identified that focused mainly on the adult learner. As time progress, updates and follow-through activities were exemplifying how lifelong learning was being used in higher education as well as other institutional systems. During the last two years of the first decade of the 21st Century, UNESCO became very prominent in consolidating the research and practice of lifelong learning in adult and higher education and strategically encouraging its implementation. The promise for the future appears to be in moving from rhetoric to action in the many years that are ahead of us.

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Key Terms and Definitions

Collaborative – good willed, team up, supportive, side with, form an alliance with, pull together, cooperative

Comprehensive – complete, all-embracing, integral, whole, lacking nothing, conclusive

Effective – vital, influential, momentous, significant, consequential, strong, firm, vigorous, energetic, guiding

Empower – energize, strengthen, electrify, enable, endow with power

Ethical – virtuous, pure as the driven snow, principled, just, loving, prudent, faithful, impeccable

Interactive – working together, joint, mutual relationship, compatibility, interpenetration, reciprocate,

Learning – finding out, inquiring, self-instruction, ascertaining, illumination, acquiring wisdom,

Lifelong – abiding, continuous, durable, lasting, enduring, from cradle to grave

Model – epitomize, exemplify, set an example, personify

Pillar – that on which some superstructure rests, supporting member, foundation

Proactive – undertake, get one's mind into, initiative, self-direct, take in hand, assume responsibility

Re-Orientation – move in another direction, reformulate, refashioning, reformulation

Back-Home Application

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Occasionally ~~add a component~~
~~for one and a half hours~~ I ~~add a~~ add another component in the design, which I think of as "back-home application," but which in the literature is usually referred to as "transfer of training." I ask the participants to reflect for five minutes on their experience so far and to select one or two ideas they have picked up that they think they would like to try out in their back-home situations. After five minutes I ask them to

- I. form groups of four or five and take turns describing to other members of their group (1) the idea they would like to experiment with; (2) the steps they would take in applying it, and (3) any obstacles or resistances they anticipate encountering in putting it into effect. After a reasonable amount of time
- II. (depending upon the time available), I call them back to order and invite volunteers to present their plans to the total audience. After
- III. each presentation, I invite members of the audience to react to the plan and, particularly,
- IV. to suggest strategies for dealing with the obstacle and resistances. During the last five minutes or so I add my own ideas about strategies for bringing about change.



EXCERPTS
FROM
Applying Principles
of Adult Learning
in Conference
Presentations
Malcolm S. Knowles

Back-Home Application

--- Transfer of Learning ---

1. **Reflect on-- If your group were assigned the responsibility at a university to implement lifelong learning throughout the university system, how would you proceed:**

[1] What idea would you like to experiment with?

[2] What steps would you take in applying it?

[3] What obstacles or resistances do you anticipate encountering in putting the idea into effect?

- **Obstacles:**

- **Resistances:**

[4] How do you seek to overcome or deal with those obstacles and resistances?

2. **Get together in groups and discuss your idea, steps, obstacles & resistances.**
3. **After ample time for the groups to discuss, the leader will call all of the small groups back to the attention in the total group.**
4. **The leader invites volunteers to present their plans to the total audience – one group at a time as long as time permits.**
5. **After each plan is presented, the leader then invites members of the total audience to react to each plan and, particularly, to suggest strategies for dealing with the obstacles and resistances.**
6. **At the last, the leader will add his/her own ideas about strategies for bringing about change.**

Evaluation of This Workshop



- **As a result of this workshop session,
I will**

“Thank You for Your Attention”

Andragogy Websites:

<http://www.lindenwood.edu/education/andragogy.cfm>

<http://www.umsl.edu/~henschke>



ขอบคุณและ
สวัสดีครับ



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