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Inside Story of a Global Research Project: Lifelong Learning and Higher Education

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Abstract: This paper focuses on a process for helping a traditional higher education institution make a shift toward an orientation of lifelong learning. The sections provided are: Background of the relationship between University of Missouri and University of Western Cape; the international bridge building conferences; characteristic elements and measurable performance indicators; culture – development of new directions and related questions; impetus for the project; difficulties of bringing together the thinking from many countries; confusion that emerged, understanding communications, tensions and how they originated; differences throughout; fulfilling and contradicting expectations; comparing national and international networks; values and disappointments in international work; mosaic-stone adding to the overall result; and result, outcome and insights gained.

The starting point of this project was a practical issue: 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. 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, and how to work in these situations.

Identifying the elements of such a re-orientation toward lifelong learning was developed by adult education researchers at the University of Missouri (UM) in the Extension Division, and the St. Louis (UMSL) Campus on the North American Continent and the Northern Hemisphere, and by adult educator researchers at The University of The Western Cape (UWC), Cape Town, South Africa, on the African Continent and the Southern Hemisphere. This article will describe the process and some outcomes of the cooperation of these two institutions. During this process, elements of a re-orientation and a tentative policy statement were cooperatively developed. However, in the context of this book a second aspect focuses on: How this process of an international project was started, how it developed, what opportunities and pitfalls we encountered, and what lessons we would like to share

with other international colleagues that plan to start a project including other countries.

Background of the Relationship between UM and UWC

When divestiture of the economic holdings of other countries in South Africa came in the later part of the 20th century, The University of Missouri (UM) started the process of divesting itself of its monetary holdings in South Africa. In considering this, UM officials reasoned that since their greatest asset is education and learning, they may be able to help hasten the demise of apartheid by offering to make this asset available to the situation. When inquiring how this could be accomplished, it was suggested by some in South Africa that they contact The University of The Western Cape [UWC], an institution that had been established in the mid 1950s during the heyday of apartheid, to serve the “black and colored” population. This was the only university (higher education institution) this population could attend. All other universities served a “white” population. Thus, the relationship between UM and UWC was established and for about 20 years they have conducted numerous educational exchange projects for their mutual benefit.

When apartheid was legally abolished in South Africa, among other changes, this made it possible for people of all races to attend any of the universities. Consequently, UWC no longer had an exclusive population from which to draw their students. They needed to move in the direction of recruiting a wider spectrum of students. One of the topics focused on in this process was to begin the process of re-orienting a traditional university toward lifelong learning. The beginning focus was on administration power and decision-making processes. Next the focus shifted to the theory of lifelong learning [LLL] and the experience of higher education institutions implementing this. Following were a series of International Conferences that contributed to the process.

International Conferences Built Bridges

The topic under consideration was ‘Reorienting a Traditional University toward Lifelong Learning’. Some Adult Educators at the University of Missouri (UM) in the Extension Division and the St. Louis (UMSL) Campus were involved in researching the background of this topic – reorienting a traditional university toward lifelong learning – 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 UNESCO 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 gatherings of adult educators resulted in the formulation of the “Cape Town Statement on Characteristic Elements of a Lifelong Learning Higher Education Institution”. They first 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 general 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. However, to make certain that it was a mutually cooperative project and that both universities were operating from the same perspective during the meeting, broad, specific, and process objectives were worked out prior to and in preparation for the meeting.

Broad Objectives of visit were: Promote an institutional culture of lifelong learning (LLL) at The University of The Western Cape (UWC) through the development of instruments for ongoing quality assessment of the LLL mission; and, provide opportunities for the University of Missouri (UM) delegates to meet with a broad range of UWC people in order to assist with the refinement of plans to develop UWC as a LLL institution. This will include meeting senior management (administration and academics), educators and learners, particularly part-time learners and educators.

Specific Objective of the visit was to: Develop measurable performance indicators, which are likely to be accepted and used at UWC, for the six characteristic elements of a lifelong learning institution as described in the Cape Town Statement.

Process Objective of the visit was: In Cape Town, at the conclusion of the Lifelong Learning, Higher Education and Active Citizenship Conference in October, 2000, it was agreed upon by Shirley Walters and Kathy Watters from UWC, Werner Mauch from UNESCO, and John Henschke from UM, that in May, 2001, when we (*meaning a team from UM and personnel from UWC*) would meet in Cape Town, we would then develop the actual “measurable, performance indicators.” It was also agreed that during the visit in May, 2001, we would engage in an adult education process that would move us along a track of mutually supporting each other and identifying the things that need to happen to carry

forward the implementing of what would become “The Cape Town Statement on Characteristic Elements of a Lifelong Learning Higher Education Institution.

It was discussed and further agreed upon that the process for May, 2001 would be mutually supportive, collaborative, and exploratory in a give and take relationship between the UM and UWC personnel. This choice would be in contrast to and instead of a process that would place the UM personnel in a "judgmental" position over the UWC personnel, which ultimately could be counter productive in light of the collaboration and commitment we are mutually seeking to accomplish between UM and UWC in this part of the Project.

During the time of the visit, to assure a broad spectrum of thinking two hundred [200] different people from various groups at UWC were involved in discussions. These people included: Deans of various colleges within UWC; Center of Adult and Continuing Education Personnel; International Relations Center Staff; Division of Lifelong Learning Staff; Rector [Chief Executive Officer of UWC] and his cabinet; Academic and Business Officers; People from the Media; Various Classes of Full-Time and Part-Time Students; An informal gathering of people.

The discussions modified the original six (6) “Characteristic Elements” into seven (7). 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 sixth [6th] characteristic element [Decision Support Systems] was the seventh [7th] element that was added to the original six [6]. It had mainly to do with the importance of a positive attitude of those in the institution toward the constituencies and individuals that are being served.

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 been shared and presented at numerous adult education conferences in the USA and internationally.

In addition, The 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.

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.

In the 2002 annual report of the Division of Lifelong Learning 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 was on accredited part-time studies, in which they also developed the substantially revised fourth edition of “Juggling to Learn,” 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.

At a later time 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.

Culture – Development of New Directions and Related Questions

1. What was the impetus for the International Adult and Continuing Education Hall of Fame (IACEHOF) –Induction in Germany?

An outgrowth of this international involvement resulted in two [2] adult educators – one from Germany and one from the USA – working on two [2] international conferences to be held in Bamberg, Germany for September, 2006. One conference focused on adult education history, and the other one on comparative international adult education. Added to this conversation and planning came the idea of having, during this time, the first induction ceremony of the International Adult and Continuing Education Hall of Fame [IACEHOF] to be held outside of the USA. It proved to be a formidable task to get that accomplished. The IACEHOF Board members had to be and finally were convinced that this was economically feasible. However, that was the starting point of numerous conflicts that almost cancelled the IACEHOF event.

Nevertheless, the two [2] adult educators who originated the idea, successfully dealt with all the controversies. The Hall Board President: Sought to structure the screening committee so some nominations would not be accepted; tried to change the selection process half-way through to eliminate some nominees; refused to come to the induction ceremony; made moves to change the Hall into something other than honoring those who have made impacts on the Field of Adult Education. However, fourteen [14] new inductees were added to the Hall at that ceremony.

Dr. Shirley Walters, Director of the DLL at UWC, was invited to be a keynote speaker at one of the Bamberg international conferences, especially so she could be present at the Hall Induction Ceremony, since she is an inducted member of the Hall. She first accepted the invitation, but later she had to cancel because of illness, which was very disappointing.

2. What happened to John Henschke while working in this internationally mixed group between UM and UWC and other countries?

We developed much collegiality and friendship during our social time together. However, this did not carry over into the work that had to do with re-orienting a traditional higher education institution toward lifelong learning (LLL). The UM Team was action-oriented and wanted to get things accomplished. The UWC Professionals were much more oriented toward thinking, discussing and talking about a LLL orientation in traditional university. Since the UM Team was at UWC for the purpose of helping them, all that UM could do was to wait until UWC was ready to take action, if they ever did. This was a difficult experience in developing patience. It became apparent that UWC was at a much earlier stage of development and commitment with respect to identifying and implementing “measurable performance indicators” (MPI) of LLL.

3. What confused you / others most in this project?

When the UM Team and the UWC top administrators came together to discuss the LLL re-orientation recommendations for UWC, that was the most confusing. The UM Team included the Chief Executive Extension Officer, who had worked with UWC for a decade and had been present in Cape Town numerous times. The UWC Director of the Division of Lifelong Learning (DLL) was part of the reporting team. Both sides had agreed on what was to be reported / presented to the UWC Rector / President. Each of the persons from both sides at the table talked about his/her commitment to the project and the painstaking efforts and research that has gone into developing the report. However, when it came time for the Director of the DLL to speak, she said that she really didn't know if what we mutually had developed about LLL was actually LLL. Everyone was startled and confused by her comments since we all had expressed agreement prior to the meeting. I was tempted to say something in response to her in the meeting but didn't. Moreover, I checked with the UM Extension CEO following the meeting, and he agreed that it was not our place to comment on or say something counter to her remarks.

4. What made communication / understanding difficult / easy?

The perception prior to the May, 2001, UM team's arrival in Cape Town was that UWC had indicated through various documents a strong commitment to lifelong learning. The UM Team worked vigorously throughout the first week of the visit, to develop a set of "measurable performance indicators" that would be acceptable to UWC, and conduct the various meetings in such a way as to convey our interest in lifelong learning and in helping to promote it within UWC. The assumption was also made, incorrectly as it turned out, that UWC was ready to move forward with implementing LLL. The sum of all of the UM Team first week of meetings and discussions with UWC personnel clearly indicated that lifelong learning (LLL) is a contested concept – there is no agreement on whether LLL should or should not be implemented at UWC. Although the concept of LLL is included in UWC's Mission Statement, one thing became apparent during the meetings; there were no consistencies at UWC between individuals regarding what lifelong learning meant. For some, it meant part-time students. For others, it was something the Division of Lifelong Learning (DLL) did. Still others clearly had no concept of LLL.

That LLL was a contested concept at UWC was difficult to understand, nevertheless it was easy to perceive that this being the case, with the response made to the things that were shared on LLL, or for that matter not shared at all.

5. Were there tensions in the group, and where did they originate?

In preparing to go to South Africa in May, 2001, I had the responsibility to gather a team from UM to address the issues and go the South Africa to work with them. I had the Vice-Chancellor of Students, an African-American Professor of Reading and Adult Education, an African American Professor of Adult Education, and myself as a Professor of Adult Education. I thought it would be helpful to have these two [2] African-Americans on the team since we would be working with the UWC population who are mostly black and colored. When I shared with the Director of the DLL who I was bringing on the team, she expressed some dissatisfaction and said that she wanted everyone on the teams "twined" with someone from the same level in both UM and UWC. She also expressed that she wanted someone on the team that would have the confidence of the Rector / President of UWC. I responded to that concern by asking the UM Extension CEO to join the team. He was only able to come for one of the two weeks the UM Team was to be in South Africa.

While the total UM Team was in Cape Town, we went out to dinner with some from the UWC, and had some Faculty from the University of Cape Town [a private university] join us. What was quite disconcerting to the UM Team [we talked about

it among ourselves after the dinner] was the DLL Director's "diatribe" on how the USA was not living up to its social and economic responsibilities in helping the poorer countries, solving its own racial problems, supporting movements of justice in various spots around the world, and other things too numerous to mention. I am certain she felt justified and accurate in saying those things. The UM Team sought to be respectful guests, listened attentively, and did not respond defensively. Needless to say, this was a bit difficult to hear from our perspective, since it was the United States Aid for International Development [USAID], the United States International Agency [USIA], and the University of Missouri [UM] that have paid the money for all the travel in both directions [for people from UM to go the UWC, and for people from UWC to go to UM] and other things related to this program of support to UWC and South Africa for their present and future.

6. Were there differences / developments at the beginning, middle, end?

The development and beginning of this project was initiated by three adult education administrators – two [2] from UM, and one [1] from UWC. When I was invited to get involve and participate, my presence tilted the focus away from administration toward the teaching / learning process and especially as it is found in the university classroom and its outreach into the wider community and society.

In the middle of this project, I became involved and hence its movement away from the administration of adult education toward adult learning. Thus, the UM Team and UWC Team was not matched as closely as the UWC / DLL Director would have liked. Henschke is aware that although he proposed a give and take procedure prior to the UM team going to Cape Town, Shirley Walters thought that the UWC Personnel would not agree to conducting the sessions in that way. However, various people indicated during the meetings with the UM Team that the give and take exchange of ideas among UWC Staff would be helpful.

At the end, the administrator from UM-St. Louis, felt that I had overspent what was allocated to the project by taking five [5] people on the UM Team, instead of just taking four [4] as he would have recommended. Thus, as the project moved toward a slow down nearing the end, I suggested that he make the last trip to UWC, instead of me. Because he had a better idea of what he wanted to see accomplished, I felt that this would be the opportunity for him to pull the loose ends together as the project was being concluded. He went, but I have not heard anything more about the project. However, he was the person who nominated the DLL Director to the IACEHOF, and arranged for the support of her travel to Boston, MA in 2005, to attend the Induction Ceremony.

7. What was fulfilling your expectations, what contradicted them?

It needs to be noted that the struggle for agreement and action on the characteristic elements of lifelong learning and matching performance indicators was difficult at best, and will continue to be a struggle for some time to come. The UM team visit was to develop MPI which were likely to be accepted and used at the University of The Western Cape (UWC). To assert that “moving any higher education institution in the direction of developing a lifelong learning orientation poses a formidable task,” is a major understatement. It is difficult to accomplish, especially more so in a two-week period of time. To underscore this, the UM team had to remind themselves of the nature of the visit and task. The visit for the UM team was to develop “Measurable Performance Indicators,” which they thought would be accepted and used at the University of the Western Cape (UWC). Specifically, the UM Team developed “Measurable Performance Indicators” for the six (6) characteristics initially identified in the Cape Town Statement indicated above on “Characteristic Elements of a Lifelong Learning Higher Education Institution.” However, the revised list was ultimately changed to include seven (7) “Characteristics” and supporting “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, will be a lifelong endeavor that will continue for years to come. The discussions modified the original six (6) “Characteristic Elements” into seven (7).

The seventh [7th] Characteristic Element was Decision Support Systems. It is characterized as providing 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

This was not injected by the UWC, but it was added by the UM Team after the initial “measurable performance indicators” were rejected and there was a need for revision. Perhaps this was the “crowning blow” that made UWC perceive that this project was being completely taken over by the UM Team, and really did not belong to UWC.

8. What differences / benefits / difficulties between working in national networks compared with the international network?

Working national networks seems to be more oriented toward unanimity of thought, whereas, international networks appear to have more of diversity of

opinion. Thus, there is much more dialogue, clarification, discussion, conflict resolution and listening to the others point of view that must take place in international networks.

9. What was the value, but also the disappointments you got out by working in an international group?

I was delighted and hold valuable the fact that I learned so much from this experience and developed a LLL system [to which I am continually adding and refining] from which others in the USA are benefiting, and the benefits UWC have derived from it. I have made some excellent networks with many adult education colleagues from numerous countries around the world. One adult educator I met in South Africa and was involved in the 2000 Conference. He was from Nigeria, and has moved to the USA. Since then I have worked with him in the Commission on International Adult Education [CIAE] of the American Association for Adult and Continuing Education [AAACE], the Commission of Professors of Adult Education [CPAE], and the Missouri Valley Adult Education Association [MVAEA] our regional adult education professional association. Our adult education academic program at UM-St. Louis, a number of our masters and doctoral graduates are using this system to help improve their organizations, their personnel and the constituencies they serve. I have presented the findings from this research on LLL at National, International, Regional, and Missouri State Adult Education Conferences. Without exception, at least one person [and usually more than one] from each conference takes the information on re-orienting a traditional educational institution toward LLL, and seeks to apply it in their own community.

My disappointment in this whole project has been that we were not able to apply it with more educational institutions, not only in the USA, but around the world in more countries. There is still more work to be done, and I intend to do what I am able to overcome that disappointment and turn it into accomplishment.

10. What concretely was a mosaic-stone adding to the overall result?

It seems to me that the central concrete mosaic-stone adding to the overall result was the desire of both UM and UWC to cooperate together and accomplish moving the institutions in the direction of LLL. If anything productive came out of this effort [and I believe it did and will continue] it is because of the mutual caring of these institutions for each other and the constituencies they serve in their own countries and around the world.

Henschke would probably encourage greater effort in discussing how we could have been of more help to them. UWC have a philosophical perspective oriented towards discussion, and UM has a more action-oriented philosophical perspective. These two may not change. However, he thinks it could be of benefit for UWC and for UM to spend more time working out the details of what UM could do that would be helpful to UWC, and to share with UWC the background of the things that inform UM's actions. He believes more time would need to be devoted to the visits, if UWC were to be oriented in this way, and more time could add to UM's contributions to UWC's work. The DLL staff were doing excellent work and whatever could be done to provide to them additional help, should be done. More time with the students would also add benefit.

Result, Outcome, Insight of this chapter for ISCAE.

The experience in this project showed: Without international conferences (and the financial support for researchers to attend these conferences) the necessary contacts would not be possible. Networking between persons and institutions depends heavily on the possibility to meet face to face; conferences supply this chance. But the experience in the described project shows an experience which might be overlooked often: It was not "the one" conference or meeting, it was the series of contacts in various form that made things develop. Continuity, reliability, sustainability are extremely important and crucial. There is no guarantee that sustainable effects will happen. The experience shows that some colleagues show up on one conference and never again. But as analyzing the existing networks (i.e. in ISCAE) demonstrates very well, most of these connections were started during international conferences. Without this being repeated and person to person meeting in conferences this network of experts would not be built.

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