



**COUNCIL OF MINISTERS OF EDUCATION,  
CANADA**

**RESEARCH REPORT**

**Developing an Adult Education Policy Framework:  
Terminology, Typology and Best Practices**

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Adult education is a topic of importance and focus for provinces and territories, and considerable work has been initiated in Canada to advance the agenda of lifelong learning and adult learning.

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## EXECUTIVE SUMMARY

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### INTRODUCTION

The Council of Ministers of Education, Canada contracted Innovative Training Solutions Inc. to produce a research report that would support the development of a policy framework for adult education across Canada. This report provides the building blocks; definitions, typology, best practices and guidelines; to create a Pan-Canadian framework.

Research was conducted between December 2004 and March 2005 employing: an extensive literature review of recent adult education and lifelong learning journals, books, and reports; the completion of a survey by provincial and territorial governments involved in the development and delivery of adult education programs; a review of federal government websites to identify adult education and training programs; and consultation with a targeted group of expert adult educators and practitioners.

### CANADA: ADULT EDUCATION POLICY CURRENT STATE

A ten-question survey was distributed to all provinces, territories and two federal government departments. Thirteen of the fifteen targeted jurisdictions were able to respond in the time allowed for survey completion.

Although all responding jurisdictions indicated that their departments or ministries of education or higher education were involved in the management of adult education programs, there was no single government organization that claimed overall responsibility. In some provinces these responsibilities appear to be split between several ministries overseeing education, labour and/or human resources development programs.

Only a few provinces or territories claimed to have a definition or guiding principles for adult education programs and none indicated that they had specific legislation targeted at adult learners, although a few indicated that they were moving in that direction. In almost all jurisdictions more general education or labour legislation or university or college acts supported the provision of adult education programs. Most adult education programs were targeted at the economic (i.e. back to work or skill enhancement) needs of their constituents.

The provinces and territories identified fourteen potential barriers to the successful creation of a Pan-Canadian policy framework. Issues of capacity (federally, provincially and institutionally), jurisdiction, funding, population needs, labour market needs and a lack of research and development in adult education are included in these barriers.

Based on the survey results several findings are offered as the federal government and each province and territory moves forward to create strategies for the implementation of adult education and lifelong learning policies and programs. These findings include the requirement for: (1) a single definition for adult education, (2) supporting legislation for adult education, (3) a collaborative decision making process, (4) a diversity of shared and equitable funding strategies, (5) a commitment to adult education, (6) a recognition of experiential (informal) adult education, (7) an expanded focus for adult education, (8) a recognition of geographical, cultural and language differences, and (9) a move toward a Pan-Canadian approach to adult education.

## DEFINITIONS AND TYPOLOGY

Based on a review of the literature and consultation with stakeholders, it was determined that the concept of lifelong learning encompasses the fields of adult learning and adult education. Adult learning is considered to be a subset of lifelong learning – in that it is applied to learning only in the adult years. Adult education is considered to be a subset of lifelong learning and adult learning, in that learning by adults occurs both within the framework of adult education, and also beyond it. The following three definitions were developed based on a review of the literature and in consultation with adult education professionals.

**Lifelong Learning** – *the development of human potential through a continuously supportive process, which stimulates and empowers individuals to acquire all the knowledge, skills, values, attitudes, and understanding they will require throughout their lifetimes as individuals, citizens, and workers.*

**Adult Learning** - *the process or the result of adults gaining knowledge and expertise through practice, instruction, or experience. Adult learning may be intentional or non-intentional, may take place in a variety of settings, at home, in educational institutions, at work, or in the community.*

**Adult Education** - *all sustained, systematic, and structured educational activities, at any level beyond initial education, whether offered formally or non-formally, which are undertaken by all of those defined as adults in their society for the purposes of personal, social, or workplace knowledge, skills, attitude, and values acquisition.*

Within the literature, adult education is often described as one of the following: formal, non-formal, or informal or experiential learning. Although the literature extensively uses these three terms, it was found that they are often used in different ways and at times conflict with one another depending on the author. To avoid potential confusion and to employ terms that are clear to all readers it is recommended that the three types of adult education learning experiences be titled as: Certified, Not Certified, and Experiential. These types of learning experiences are consistent with formal, non-formal and informal as described in the literature.

**Certified** - *Structured and organized training, education or professional development experiences that are provided through an educational institution, in the workplace, or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.*

**Not Certified** - *Organized or systematic educational, training or professional development activities carried out in Canadian society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.*

**Experiential** - *The process of acquiring knowledge, skills, and values from daily experiences at home, in the community, or at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that Canadians may seek out these experiences to enhance their individual or collective learning.*

To support the creation of a policy framework, a proposed typology was produced that embraces the concepts and definitions of lifelong learning, adult learning and adult education.

The proposed adult education and lifelong learning typology consists of four major categories. The proposed typology categories are: (1) Adult Education in the Knowledge Age, (2) Adult Education for the Civil Society, (3) Adult Education and Culture, Media and ICTs, and (4) Adult Education and Living Longer and Learning Wider. The typology emphasizes the importance of adult education for work, for living as members of society, for living in a highly complex ICT world, and for living longer and wider lives. The proposed typology has informed the creation of a Pan-Canadian policy framework.

## PROPOSED POLICY FRAMEWORK

Building on the definitions and typology and taking into consideration the survey feedback from the provinces and territories a proposed policy framework for adult education and lifelong learning in Canada was developed. The model, as reflected in the diagram below depicts 12 quadrants based on four categories and three major types of adult learning. To support each quadrant, governments and other involved agencies will need to create unique policies and programs for each adult learning category (Global, Social, Economic, Community and Personal) that can be delivered (as described in the last section) in either a certified, not certified or experiential manner depending on the target audience.

	CERTIFIED	NOT CERTIFIED	EXPERIENTIAL
GLOBAL			
ECONOMIC			
SOCIAL			
PERSONAL DEVELOPMENT			

Each adult learning category in the framework may require the creation of customer policies and programs based on the following description of each adult learning experience.

1. **Global** -The typology category “Adult Education in the Knowledge Age” states “adult education is to ensure that adults are able to work and compete in the global economy, through the development of skills and knowledge which are of value to organizations and the marketplace. The goal is economic sustainability through perpetual learning.” To achieve this in a Canadian context, policy and program development must support both the international and national economic needs of Canada. Although these needs are complimentary in some areas, they can be treated as two separate areas of interest when creating policy. It is therefore recommended that there be two categories supporting economic development, each with its own unique demands: Global and Economic. The Global category can be described as “learning experiences that impact a citizen’s ability to exist in the global market place.”
2. **Economic** - The second economic policy category should be used to address issues of employability, vocational training and workplace related training. Thus the Economic category will provide policies and programs to support “learning experiences that prepare a citizen to perform a specific job or to be part of an occupational group.”

3. **Social** - The Social category embraces the concepts presented in the “Adult Education for Civil Society” typology description. This category will address policies to support “learning experiences that enhance a citizen’s ability to be a valued, active and contributing member of his/her society and local communities.”
4. **Personal Development** - The fourth category “Personal Development” incorporates the ideas of “Adult Education and Living Longer and Living Wider”. This category will address policies and programs that support “learning experiences that are pursued by individuals ‘because they need to know or want to know’. Citizens are exercising the ideal of learning for living.”

It is proposed that a final category called “Culture, Media Information and Communication Technologies (ICTs)” be integrated into the other four categories since it is assumed that ICT is a key component of them all. In addition, the creation of an ICT infrastructure to encourage the growth of a national adult education and lifelong learning culture and to support the implementation of all four categories of adult education is deemed essential.

## GUIDING PRINCIPLES

The proposed policy framework is informed by a number of guiding principles and promising practices. It is suggested that the following principles be used to guide the creation of an adult education and lifelong learning system that would support all Canadians.

- ❖ **Founded on Strong Partnerships** – All levels of government, the private sector, not for profit organizations and volunteer agencies must establish partnerships to jointly address the needs of their various communities. Funding formulas, tax incentives, communications and idea sharing methods and other initiatives must be established to encourage active and continuous participation by all partners.
- ❖ **Community Focused and Driven** – The Canadian adult education and lifelong learning system must be driven by the needs of regional, cultural or economic communities. Each community must have the ability to tailor their education and lifelong learning programs to respond to the needs of their members. Needs should flow up, support should flow down.
- ❖ **Recognition and Portability Across Boundaries** – A process must be established to allow the recognition and portability of professional and personal competencies across territorial and provincial boundaries. The various certifying bodies that exist within Canada must recognize the principle of portability.
- ❖ **Strong Learner Support** – A wide variety of services must be established to support the learners through their lifelong learning journey. These may include: academic and lifelong learning counseling; ready access to information and programs; financial support; PLAR assessments; competency tracking; and others.
- ❖ **Program Flexibility** – Programs must be developed in a way that actively encourages learners to participate and to continue to participate throughout their lifetimes. Open entrance standards, flexible delivery methods, flexible schedules and more time to complete are needed to ensure program flexibility.
- ❖ **Quality Programming** – Adult education and lifelong learning programs must be instructionally sound, motivating and well designed.
- ❖ **Founded on a National Infrastructure** – To ensure that everyone has an equal opportunity to participate in the adult education and lifelong learning system, no matter their location or time of study; traditional and ICT infrastructure must be

provided to all communities to ensure that they have the tools needed to address their community needs.

## STUDY OVERVIEW

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The field of adult education is characterized as being complex and diverse in its organization, and broad in its impact (Wise & Glowacki-Dudka, 2004; Tuijnman, 2003; Tweedell, 2000). As a result, it is a field that is increasingly rising to the forefront as governments work to develop lifelong learning strategies in response to the economic and social requirements of the global knowledge economy. In fact, many argue that it is through the implementation of adult education policy and programs that the goal of lifelong learning can be not only achieved but also sustained (Cross, 2004; European Commission, 2002).

*Adult education and continuing education and training are means of combating poverty and social exclusion, participating in regional development, promoting the socioeconomic integration of segments of the population with specific duties and contributing to cultural vitality (Government of Quebec, 2002).*

However, part of the challenge in developing an adult education policy framework is that there are few if any commonly accepted definitions, typologies and models to guide program and policy development. This research study examines the state of national and international adult education with specific emphasis on terminology, typology, policies, and promising practices.

In this study, existing comprehensive policy frameworks and their stages of development both nationally and internationally are examined. Key concerns, challenges and barriers to implementation being faced by those frameworks are identified and discussed. Initiatives that have developed principles or guidelines for improving policy and program practices are reviewed and leaders and organizations supporting the development of comprehensive frameworks are highlighted.

*Adult learning and education have always played a significant, if undervalued, role in the development of this nation's economic strength and formation of its multicultural traditions. The demands of the 21<sup>st</sup> century have placed renewed emphasis on the role and importance of learning broadly and adult learning in particular as a key agent in this nation's renewal and revitalization. (Council of Ministers of Education, Canada, 2004, p. v)*

Governments throughout Canada are trying to determine how to embrace and implement the concept of lifelong learning. As evidenced in the survey results from the provinces and territories, the role of the private sector and non-government organizations in the development, delivery and management of adult learning programs is not well defined. However, the majority of provinces and territories reported that they have undertaken a fundamental review to define their adult education and lifelong learning goals and to determine how to structure their formal, non-formal and informal education and training environments to support these goals. It is through the reorganization of existing structures and creation of new ones that Canada's goal for lifelong learning will be possible.

This research focuses on identifying, reviewing and defining adult education terms and concepts for the Canadian context in order to guide policy development. The proposed definitions are grounded in a typology framework that identifies the various adult education components and is supported by the literature in the fields of lifelong learning, adult learning and adult education. Promising practices in adult education policy and programs both

nationally and internationally are examined. These practices are used to inform the development of a suggested model of adult education and learning for Canada. Based on this model, a policy framework is provided and suggestions as to the type of agencies that should be involved in each part of the model are discussed.

## STUDY METHODOLOGY

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### INTRODUCTION

This study was undertaken on behalf of the Council of Ministers of Education Canada with the following intents:

- ❖ Review of promising practices, identifying existing policy frameworks both nationally and internationally as well as the stage of their development, and key concerns, challenges, and barriers to implementation being faced by these frameworks.
- ❖ Development of a consistent set of definitions and understandings related to lifelong learning and adult education, and a typology of adult education, which might serve to guide national policy development frameworks.

This research is a natural progression building on earlier CMEC research, in particular the CMEC Report (2003) of a provincial and territorial adult education survey conducted under the aegis of the Postsecondary Expectations Project Committee. The report made a number of recommendations for the future, including the development of common operational definitions and typologies, the crafting of policy frameworks for adult education/learning, and the initiation of policy relevant research which provided a start point for this research study.

Canada is a diverse nation in terms of ethnicity, governance, and policy. The thirteen provinces and territories hold jurisdiction for education, but funding of certain adult education activities – particularly areas of adult vocational training and back to work programs - are often reliant on support of the federal government. Each province and territory works through its own ministry or department of education (or similar agency) to provide educational services, setting its own agenda in accordance with local population needs. In areas such as First Nations citizens, penitentiary inmates, the Armed Forces, and the Coast Guard, the federal government has direct responsibility for supporting adult education and training programs.

Given that there are numerous separate jurisdictions responsible for the education of adults in our nation, it is necessary to develop and share common terminology and understandings, if a pan-Canadian policy framework is to become a possibility.

### RESEARCH QUESTIONS AND OUTCOMES

In accordance with the terms of reference for the study, the research was guided by a number of research questions as follows:

#### General Questions

1. What initiatives can be drawn from the literature on adult education about current policy initiatives, nationally and internationally?
2. Are there promising practices in the various adult education spheres?

#### Specific Questions

1. What existing policy frameworks for adult education exist, on national and/or international levels?
2. Which organizations are currently involved in developing comprehensive adult education policy frameworks?
3. What are the perceived concerns, barriers, and challenges to implementation of comprehensive adult education policy, nationally and/or internationally?

4. What are the current best practices in the design, delivery, and evaluation of adult education and learning?

The intended outcomes of this research study were:

- ❖ Identification of adult education terms and concepts in need of common definition;
- ❖ Development of common definitions;
- ❖ Development of a typology or classification scheme for adult education;
- ❖ Identification of adult education best practices;
- ❖ Development of a suggested policy framework for adult education.

## RESEARCH METHODOLOGY

The methodology employed in this literature review can be described generally as a research synthesis, incorporating non-statistical meta-analysis. The American Institutes for Research (AIR) describes research synthesis as “a document or series of documents produced to outline available data or literature on a given topic, through searching the literature, managing reference data bases and developing coding schemes” (n. d.). Non-statistical meta-analysis has appeared relatively recent in the research literature: “The approach includes model development, literature retrieval, literature coding, rating references for quality, annotating high quality references, and synthesizing the subset of the literature found to be applicable and of sufficient quality to be included” (Bland, Meurer & Maldonado, 1995, p. 642).

The particular approach used for this study is modeled on that used by EPPI (Evidence for Policy and Practice Information and Coordination) Centre. The key elements of this approach, as implemented by the researchers, included:

- ❖ Developing inclusion/exclusion criteria and defining relevant papers/studies in relation to the established criteria.
- ❖ Defining relevant papers/studies for the various sector maps – policy, best practices, and terminology/typology.
- ❖ Defining relevant papers/studies for in-depth review – inclusion of papers/studies in which key terms appeared in titles and/or abstracts.
- ❖ Identification of potential papers/studies from the initial review.
- ❖ In depth review and classification of potential papers/studies.
- ❖ Inclusion of papers/studies representative of various perspectives.
- ❖ Narrative synthesis based on semantic content analysis of papers/studies, resulting in development of conceptual frameworks and themes.

## PROCEDURES OF THE STUDY

To implement the methodology, a number of procedural steps were undertaken.

1. Initial inclusion/exclusion criteria were established for journal articles, research papers, conference proceedings, reports, and books (See Appendix A). The major focus of the initial literature search was to be on the most recent five years, from 2000-2004. The development of inclusion/exclusion criteria narrowed the search to



manageable proportions, and also ensured that quality was considered, in that peer review was a requirement of most categories of literature.

2. Search terms and categories were established and followed by the three researchers (See Appendix B). These terms focused each section of the study in relation to the key questions, and insured that no topics or categories of literature were missed. A list of databases accessed by all three researchers was compiled (See Appendix C).
3. Solicitations of interest were sought among leading adult educators, who might be willing to act as stakeholders (See Appendix D). Care was taken to ensure that various spheres of adult education were represented in the stakeholder group. Stakeholders were meant to act as resources for the researchers by pointing to pertinent literature on request, and by providing feedback on various elements of the report. Seven adult educators agreed to act as stakeholders.
4. A survey was conducted to glean information on the current status of adult education policy and legislation in Canada, and sent to each of the ten provinces and three territories (See Appendix E). The survey consisted of ten open-response questions, and was completed by all thirteen jurisdictions.
5. A survey was prepared to glean information on the current status of adult education policy and legislation supported by the Federal Government (See Appendix F). Unfortunately due to time constraints, no formal federal response was received. To ensure federal programs were considered during the study, the research team undertook a review of federal government web sites to identify legislation, policies and programs that supported adult education, vocational training and other adult learning experiences or infrastructure support.

Following the initial literature search, which included reading titles and abstracts, promising articles and reports meeting the inclusion criteria were selected for in-depth reading of the entire paper. These were then categorized according to topics, analysed for relevant content, and searched for promising additional articles and reports.

At this stage, articles and reports published before the five-year timelines were included provided they proved to be landmark reports or to have historical relevance in the field of adult education. All papers then were analysed using semantic content analysis, followed by synthesis of key themes, concepts, and frameworks.

# THE STATE OF ADULT EDUCATION IN CANADA

## A SNAPSHOT

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### OVERVIEW

As was noted in the Methodology Section of this report, an opened ended adult education questionnaire was sent to fifteen provincial, territorial and federal jurisdictions involved in the management of adult education programs on behalf of their constituents. The study team received responses from eleven of the fifteen participating governments. This section will describe the results of the survey and provides an overview of adult education legislation polices and program management in Canada at the beginning of 2005.

### MANAGEMENT OF ADULT EDUCATION PROGRAMS

In almost all provinces and territories the Ministries/Departments of Education or Advanced Education (or their equivalents) are actively involved in the administration of adult education programs. In some provinces these responsibilities are split between several different ministries overseeing education, labour and/or human resources development programs. The duties and responsibilities of each ministry vary from jurisdiction to jurisdiction, although the common thread throughout is the creation of policy and programs and the administration of various adult education programs.

#### **British Columbia**

In British Columbia, the Ministry of Advanced Education (AVED) provides funding and policy direction for the public post-secondary education and training system, and administers student financial assistance programs. AVED shares the responsibility for the management of adult education with public post-secondary institutions. Public post-secondary institutions deliver a wide range of education and training programs including vocational, career technical, English as a Second Language, literacy, and up-grading programs.

As well, private post-secondary institutions play a vital role in British Columbia's post-secondary education system by providing students with more choice and access to a wide range of program options. AVED also works closely with the Industry Training Authority to expand training opportunities in the skilled trades.

The Ministry of Community, Aboriginal and Women's Services (MCAWS), coordinates the Government's efforts to improve programs and adult education services for Aboriginal people living in British Columbia. In addition, MCAWS supports English as a Second Language training and provides settlement services for new immigrants. The Ministry of Public Safety and Solicitor General provides adult education opportunities in all of the Province's corrections facilities.

School districts (through the Ministry of Education) and public post-secondary institutions deliver courses allowing students to complete the requirements for secondary school graduation and the attainment of a British Columbia Adult Graduation Diploma. These courses are tuition free for non-graduates. The school districts and the Industry Training Authority work with the local community colleges and university colleges to bring entry-level apprenticeship and trades training to senior secondary school students.

### **Alberta**

In Alberta, the Department of Advanced Education is responsible for adult education. Within the department, the Adult Learning, the Apprenticeship and Industry Training and the Human Resources Employment Branches divide the responsibilities for managing adult education and vocational training programs. Adult Learning oversees the funding of educational providers, student financial assistance, community-based grants, certifying programs of study and licensing and certification of private sector adult education providers.

The Apprenticeship and Industry Training Branch develops program standards with industry, counsel's apprentices and employers, provides funds for approved apprenticeship programs, and certifies individuals in designated trades and occupations.

The Human Resources and Employment Branch provides funds to education providers; grants to students; approves programs of study for academic upgrading; provides information about career options; and provides skills training and helps individuals find and keep employment.

In addition to these three bodies, the following provincial organizations also have a role in adult education: Student Finance Board; Alberta Apprenticeship and Industry and Training Board; Alberta Council on Admissions and Transfers; and Private Vocational Schools Advisory Council.

### **Saskatchewan**

In Saskatchewan, the Department of Learning oversees the management, development and delivery of all adult education programs. The mandate of the Department of Learning is to advance the social, economic and personal well being of Saskatchewan people. The Department accomplishes this mandate through leadership and support programs from early childhood development, through pre-kindergarten to Grade 12, to technical training and post-secondary education, and public library services. The Department provides responsive leadership to meet the learning and development needs of Saskatchewan children, youth and adults, and to meet the employment needs of the provincial labour market. To achieve this mandate the department works with citizens to help them build better lives for themselves through economic independence, strong families, inclusive communities and active involvement in Saskatchewan's labour force and economy.

### **Manitoba**

In Manitoba the Ministry of Advanced Education and Training (AET) has lead responsible for adult education and vocational training. Within the department the responsibility for setting priorities and allocating funds for government's post-secondary institutions, skills development, and training initiatives are divided among the Adult Literacy and Literacy, Apprenticeship, Employment Training Services, Hydro Northern Training initiative, Industry Training Partnerships, Council of Post Secondary Education and Student Aid. In addition, the Language Training Branch, Ministry of Labour and Immigration, is responsible for basic, intermediate & advanced ESL and ESL literacy programming.

### **Ontario**

In Ontario, the Ministry of Training, Colleges and Universities and the Ministry of Education share the responsibilities for adult education management. Within the Ministry of Training, Colleges and Universities the responsibilities are divided between the Skills Investment

Branch and the College Branch. The Skills Investment Branch is responsible for provision of literacy and adult basic skills, enhancing training projects for trained professionals, provision of academic upgrading and delivery of English and French as a second language. The Colleges Branch is responsible for academic upgrading and also has a shared responsibility for English and French as a second language.

Within the Ministry of Education, the Field Services Branch is responsible for administering non-credit English and French as a second language; credit courses for adults leading to a Secondary School diploma; adult native language programming; and citizenship preparation courses.

### **Quebec**

In Quebec, the Vocational, Technical and Continuing Education Sector is responsible for guiding and supporting the development of educational services for francophone and anglophone adults. The Sector is responsible for the following areas:

- ❖ Defining and implementing adult general education policies, orientations and strategies, through the government's adult and continuing education policy.
- ❖ Identifying needs and setting priorities for training curriculum development or revision.
- ❖ Exercising responsibilities in the area of prior learning assessment and recognition.
- ❖ Developing indicators of success.
- ❖ In the area of vocational training, coordinating and managing short college-level training programs and experimenting with short secondary training programs.
- ❖ Coordinating communications activities.
- ❖ Managing the co-op education budget.
- ❖ Developing broad program guidelines for general adult education and vocational training at the secondary level (structural guidelines, annual instructions, curricula, etc.).
- ❖ Managing freestanding community-based action services, especially in literacy.
- ❖ Administering the federal-provincial agreement on literacy.
- ❖ Managing the federal-provincial agreement on correctional education.
- ❖ Assisting in the development of aboriginal adult and continuing education.
- ❖ Addressing distance education and e-learning issues.
- ❖ Developing programs for special needs populations (e.g. persons with physical or mental disabilities).

In addition, the *ministère de l'Emploi, de la Solidarité sociale et de la Famille* is a very active stakeholder in the area of continuing education and the *ministère des Relations avec les citoyens et de l'Immigration* has responsibility for providing training to immigrants to Quebec (language and skills required to integrate into Quebec society).

### **New Brunswick**

Within the province of New Brunswick the Department of Training and Employee Development (TED) has responsibility for most adult education programs. TED is

responsible for the community college system, apprenticeship programs and for other aspects of adult learning, except for those programs delivered through the university system.

The Department of Education's Post-Secondary Education Division is responsible for some portions of post-secondary education including Student Financial Assistance, research and innovation, funding of universities, negotiations with other provinces for education in disciplines not offered in New Brunswick, managing scholarships and bursary funds, as well as the University Infrastructure Trust Fund, Quebec/New Brunswick Cooperation in Advanced Education and Research, implementing the Degree Granting Act and addressing issues related to credit transfer, tuition, student debt and education and training and career choices. It also provides a lead in a number of multi-province and national research studies on issues related to post-secondary education.

### **Nova Scotia**

In Nova Scotia, the Department of Education has the primary responsibility for the development, management and delivery of adult education programs and services. Within the Department of Education, responsibilities are divided between the Skills and Learning Branch and the Higher Education Branch. The Skills Branch oversees the apprenticeship training system, workplace education, adult literacy/ ABE, high school diploma and GED equivalency, family literacy and ABE, career development and skills development. The Higher Education branch oversees the public and private post-secondary education system (universities, community college and private career colleges), as well as student financial assistance, Employment Assistance for Persons with Disabilities(EAPD) and public libraries.

In addition to the services provided by the Department of Education other government departments support adult learning activities. The Department of Community Services supports, on a case by case basis, social assistance recipients receiving access adult education programs such as literacy, life skills and employment readiness supports. The Department of Justice supports certain adult education programs within provincial correctional facilities. The Seniors' Secretariat promotes learning opportunities for seniors in the province.

### **Prince Edward Island**

In Prince Edward Island the responsibility for management and delivery of adult education programs is divided among a number of ministries. The Department of Education represents PEI as the point department responsible for coordination of the Memorandum of Understanding between the Province, Canada and Holland College for the delivery, management and administration of most Adult Education Programs. Funding for the Literacy/Adult Basic Education Program is a joint responsibility of the Department of Education, the Department of Health and Social Services, the Department of Development and Technology and the Labour Market Development Agreement (PEI and Canada).

The Literacy Initiatives Secretariat, a Division of Continuing Education and Training in the Department of Education is responsible for overall co-ordination and management of the literacy and adult learning system, programs and services. These programs and services include: Literacy/ Adult Basic Education Program which includes literacy skills training, high school credit acquisition, GED (General Educational Development) Grade 12 Equivalency, Workplace Education and the PEI High School Certificate for Mature Students. The manager of the Literacy Initiatives Secretariat is the project manager of Workplace Education PEI, a not for profit partnership of business, labour and government which is responsible for

ensuring learning opportunities for employed people in their workplaces and for trades people in the workforce.

### **Newfoundland and Labrador**

In Newfoundland and Labrador, the Advanced Studies Branch of the Department of Education is responsible for designing and implementing policies, strategies, programs and services to maximize human resource development through post-secondary education. The Department provides annual Grant-in-Aid to public post-secondary institutions which carry out their responsibilities under the authority of provincial legislation. The Advanced Studies Branch also governs private training through the Private Training Institutions Act and Regulations. Responsibility for Apprenticeship also falls within the Branch as does responsibility for Adult Learning and Literacy and Student Financial Assistance.

### **Nunavut**

In Nunavut, the Department of Education is responsible for the assessment, monitoring and funding of all territorial adult education programs. Programs are offered under the auspices of the Department or through their primary delivery agent, Nunavut Arctic College, an arms-length part of the Government.

### **Northwest Territories**

In the Northwest Territories, the Department of Education, Culture and Employment is responsible for public education, post secondary education, labour market training and career development services.

### **Yukon**

In the Yukon, the Department of Education has responsibility for adult education issues. This includes management of the Yukon College Training Agreement, Student Financial Assistance, Apprenticeship Programs, Trade School Regulations and Labour Market Development Programs and Services.

## **WHAT IS ADULT EDUCATION?**

It was found that no province or territory currently has a single unifying definition of adult education, adult learning or lifelong learning that they use to guide the funding, development and delivery of provincial or territorial adult education programs. Within some provinces there are a number of different ideas about what constitutes an adult education program and who these programs support. When multiple ministries are engaged in the management of adult education it was found that the concepts guiding adult education programs often differ from ministry to ministry based on their roles and responsibilities towards the adult population they are serving.

### **British Columbia**

British Columbia has no formal definition for Adult Education.

### **Alberta**

Alberta has created an informal description of adult education to guide government policy. Descriptions of lifelong learning or adult learning and their relationship does not currently exist. The Alberta description of adult education is:

*Adult education = Lifelong access to affordable, high quality advanced education opportunities.*

The Alberta government indicates opportunities may include credential programs i.e. degree, diploma, certificate, apprenticeship or skills/upgrading, employment training and preparation. Alberta Advanced Education also recognizes the importance of non-credential, non-formal learning that contributes to development of skills and professional expertise of Albertans. Both credential and non-credential programs are offered through a variety of institutions including universities, colleges, technical institutions, community outreach/learning and distance education centres.

### **Saskatchewan**

Saskatchewan reported that there is no consistent, documented provincial definition. The respondents continued to say that adult education is generally understood to encompass formal and non-formal learning and may result in credit or non-credit. Within Saskatchewan it was explained that adult education:

- ❖ Is targeted to individuals who have left the K-12 education system or people whose social/cultural responsibilities define them as an adult. (Note: some of our programs have an age requirement, i.e. General Educational Development [GED] and Adult Basic Education).
- ❖ Includes the process of developing knowledge, skills, judgment and values through participation in more formal, organized teaching/learning environments.
- ❖ Is normally focused on “knowledge of content and/or subject matter”.
- ❖ Systems (education and training) are frequently geared towards employment.
- ❖ May include education and training provided by employers and for individuals who did not complete their initial schooling (grade 12).

The above guidelines are further informed by what the respondents characterized as an imprecise definition of an adult. They stated the definition of an “adult” encompasses diverse individuals who reflect varied classes, cultures, ethnicity, personalities, cognitive styles, learning patterns, life experiences and gender. The traditional distinction between adult and adolescent by use of chronological criteria is being replaced by a distinction based on responsibility and role.

### **Manitoba**

Manitoba defines adult education as “the consciously planned, organized and intentional learning opportunities that take place in formal and non-formal learning settings to develop knowledge and skills with an identified goal or end result”. Their definition notes that “adult education begins at the point where adults meet situations which call for adjustments with respect to work, family-life, or community life”.

## Ontario

Ontario reported that it currently has no formal definition of adult education or other terms that could be used to guide program development and delivery. The respondents did note that the government has engaged in a public consultation process to develop an adult education strategy for Ontario. It is hoped that formal guidance will be embedded in this strategy.

## Quebec

Quebec is one of the few jurisdictions that have embedded their definition of adult education and lifelong learning in legislation. The province has embedded guiding definitions in their Basic Adult General Education Regulation (CMEC, 2003). The definitions reflected in the legislation are as follows:

**Adult Basic Education** - *The educational services offered to an adult in general education include training services, popular education services and student services. The purpose of these services is:*

- ❖ To enable adults to become increasingly autonomous;
- ❖ To facilitate the social and vocational integration of adults;
- ❖ To help adults enter and remain in the job market;
- ❖ To enable adults to contribute to the economic, social and cultural development of their community; and
- ❖ To enable adults to acquire learning that is certified by the Minister.

**Lifelong Learning** - *The objectives of learning as a process that goes on throughout life are to develop the autonomy and the sense of responsibility of individuals and communities, to enable them to deal with changes in the economy, in culture and in society as a whole, and to promote co-existence, tolerance and the informed and creative participation of citizens in society, in short to enable individuals and communities to take control of their destiny and that of society in order to face the challenges ahead.*

The respondents noted that it is essential that the province's approach to adult education and lifelong learning be based on people's heritage, culture, values and personal experience and that they be carried out in such a way that they enable and encourage citizens' active involvement and expression.

## New Brunswick

New Brunswick states it has no formal definition for adult learner or adult education but indicates that it is guided by the province's Quality Learning Agenda. The Quality Learning Agenda comprises four interdependent stepping stones or policy statements: early childhood; kindergarten-grade 12; post-secondary education and training; and adult and lifelong learning. The first policy statement was released as Quality School, High Results in April 2003. The early childhood and post secondary education and training statements will be released over the coming months. The adult and lifelong learning policy statement is being drafted and will be released in the summer or fall of 2005. The policy statement proposes a definition for adult learners. The definition is very broad and has not yet been approved or adopted by government, so it has not been included in this survey.



### **Nova Scotia**

Nova Scotia reported that it has no formal definition of adult education. The Nova Scotia response did note that the province's skills and learning framework document *Skills Nova Scotia*, has as one of its goals "Strengthen Nova Scotia's system of lifelong learning opportunities" and refers to the adoption of an attitude "that learning is a lifelong endeavour that starts with birth and continues throughout adulthood."

Within Nova Scotia, program criteria usually focuses on credit and non-credit learning opportunities, both formal and non-formal, within community organizations, colleges, school boards and the workplace. Some programs have specific age requirements (such as access to the High School Graduation Diploma for Adults and the GED certificate), as well as other eligibility factors (such as being out of regular public school system).

### **Prince Edward Island**

Prince Edward Island reported that their definition of adult education is guided by "The Tough Challenges: Great Rewards Literacy Strategy" created in 1996. This definition guides the provision of adult education programs to PEI citizens. The strategy defines adult education as:

*Learning opportunities provided to adult learners to increase their literacy skill levels and to achieve up to and including a Grade 12 equivalency.*

### **Newfoundland and Labrador**

Recent restructuring within the Department of Education, in Newfoundland and Labrador has resulted in the creation of a Division of Adult Learning and Literacy, and efforts are underway to develop definitions that encompass current work and future direction. The department web site employs the term adult learning to guide individuals who may be seeking information about education or job skills. The adult learning information provided on the website includes the full range of educational pursuits: basic literacy programs, high school education through Adult Basic Education programs or General Educational Development Tests, post-secondary college and university education, and non-credit Continuing Studies.

### **Northwest Territories**

The Northwest Territories reported that they do not define adult education in either legislation or policy. Respondents indicated that the proposed NWT Literacy Strategy currently in development attempts to provide guidance for enhancing literacy skills across the lifespan, from early childhood to the senior years. The adult section of the strategy identifies Grade 12 academic skills as the essential foundation for job-related training and retraining, and singles out three important initiatives to help learners achieve that foundation:

- ❖ Preventing premature exit from school.
- ❖ Integrating vocational and occupational perspectives in high school.
- ❖ Upgrading the literacy and numeracy skills of those without basic education.

Literacy in the NWT is also understood to include efforts to maintain, enhance, and revitalize the official Aboriginal languages of the NWT, with an emphasis first on fluency (these being oral languages) and also on literacy. The Literacy Strategy defines literacy as "an individual's ability to listen, speak, read, write, view, represent, compute and solve problems in one or

more of the NWT official languages at levels of proficiency necessary to function in the family, in the community and on the job.”

### **Nunavut**

The government of Nunavut has recently completed a paper entitled “Developing an Adult Learning Strategy (2004)”. Although it is not yet government policy, the document will be used to inform adult education policy and program production. The paper describes adult learning as “all aspects of adult education and training and all learning activity undertaken by adults”. The paper notes that adult learning will occur throughout a person’s life and not just their early years.

### **Yukon**

The Yukon territorial government indicates that it has no guiding definition of adult education, but generally interprets an adult learner as any person 17 years or older who no longer actively participates in public school programs.

## **LEGISLATION AND POLICY GUIDANCE**

The survey found that no province or territory has unique legislation that specifically supports adult education. In most jurisdictions, adult education requirements are embedded in the legislation or acts defining the role that public education, post-secondary education or the labour departments. Funds to support adult education are often reflected in programs or projects that are embedded in larger departmental budgets. Examples of legislation and/or government policies that currently support the development, delivery and management of adult education programs offered by the survey respondents are outlined in Table 1.

**Table 1: Canadian examples of legislation that support adult education programs**

Province or Territory	Examples of Legislation
British Columbia	<ul style="list-style-type: none"> <li>❖ BC School Act</li> <li>❖ College and Institute Act</li> <li>❖ Degree Authorization Act</li> <li>❖ Private Career Training Institutions Act</li> <li>❖ Industry Training Authority</li> <li>❖ University Act</li> <li>❖ Royal Roads University Act</li> <li>❖ Thompson River University Act</li> </ul>

Province or Territory	Examples of Legislation
Alberta	<ul style="list-style-type: none"> <li>❖ Post-Secondary Learning Act</li> <li>❖ The Alberta Centennial Education Savings Plan Act</li> <li>❖ Private Vocational Schools Act</li> <li>❖ Student Financial Assistant Act</li> <li>❖ Apprenticeship and Industry Training Act</li> <li>❖ Income and Employment Supports Act</li> </ul>
Saskatchewan	<ul style="list-style-type: none"> <li>❖ Education Act</li> <li>❖ Public Libraries Act</li> <li>❖ Regional Colleges Act</li> <li>❖ Apprenticeship and Trade Certification Act</li> <li>❖ Saskatchewan Institute of Applied Sciences Act</li> <li>❖ University of Regina Act</li> <li>❖ University of Saskatchewan Act</li> </ul>
Manitoba	<ul style="list-style-type: none"> <li>❖ The Adult Learning Centres Act and General Regulation</li> <li>❖ The Apprenticeship and Trades Qualifications Act</li> <li>❖ The Brandon University Act</li> <li>❖ The Colleges Act</li> <li>❖ The Council on Post-Secondary Education Act</li> <li>❖ The Education Administration Act (as it relates to advanced education and training)</li> <li>❖ The Department of Labour and Immigration Act (as it applies to training programs)</li> <li>❖ The Student Aid Act</li> <li>❖ The University of Manitoba Act</li> <li>❖ The University of Winnipeg Act</li> <li>❖ The Private Vocational Institutions Act</li> <li>❖ The Public Schools Act</li> </ul>
Quebec	<ul style="list-style-type: none"> <li>❖ The Education Act</li> <li>❖ General and Vocational Colleges Act</li> </ul>
New Brunswick	<ul style="list-style-type: none"> <li>❖ Adult Education and Training Act</li> <li>❖ Youth Assistance Act</li> </ul>

Province or Territory	Examples of Legislation
Nova Scotia	<ul style="list-style-type: none"> <li>❖ Education Act</li> <li>❖ Apprenticeship and Trades Qualifications Act</li> <li>❖ Community College Act</li> <li>❖ Private Career Colleges Regulations Act</li> <li>❖ Student Aid Act</li> <li>❖ Youth Secretariat Act</li> <li>❖ Degree Granting Act (plus each university has its own legislation)</li> <li>❖ Libraries Act</li> <li style="padding-left: 40px;">❖ Mi'kmaq Education Act</li> </ul>
Newfoundland and Labrador	<ul style="list-style-type: none"> <li>❖ Memorial University Act</li> <li>❖ Colleges Act 1996</li> <li>❖ Private Training Institutions Act and Regulations</li> <li>❖ Apprenticeship and Certification Act</li> </ul>
Northwest Territories	<ul style="list-style-type: none"> <li>❖ Education, Culture and Employment Establishment Policy</li> </ul>
Yukon	<ul style="list-style-type: none"> <li>❖ Apprenticeship Act and Regulations</li> <li>❖ The College Act</li> <li>❖ Student Financial Assistance Act</li> <li>❖ Trade Schools Regulation Act</li> </ul>

## ADULT EDUCATION PROGRAMS

Table 2 illustrates the adult learning programs and initiatives reported by the respondents to the Adult Education Survey. Some jurisdictions provided a very comprehensive list of adult education programs while others only provided examples of programs that are supported by their government. Therefore this list should not be viewed as a complete list of programs offered across Canada, but rather as a sample that illustrates government involvement in adult education.

Some provinces and territories reported that their governments were in the process of revising or creating a long-term strategy for adult education. Nunavut states that:

*The current state of adult learning programs in Nunavut can be described, at best, as fragmented. There are a plethora of individual initiatives which are community, regionally, or occupationally based, with little or no coordination between them". (Nunavut, 2004, p. 75)*

Thus the need for a comprehensive adult education strategy that will include a wide array of programs to support the territory's population.

Manitoba notes that based on their definition of adult education that the province provides the following publicly sponsored adult education programs:

- ❖ Adult Literacy Programs: coordinate and fund for community-based tuition-free literacy programming for adults in need of literacy instruction to meet employment, training and/or personal literacy-related goals.
- ❖ Adult Learning Centres (ALC): coordinate and fund ALCs to offer tuition-free educational programming for adults to complete credits leading to high school completions or other prerequisites to pursue further education/training and employment opportunities.
- ❖ Workplace Education: coordinate and fund workplace literacy/essentials skills programs and projects
- ❖ Industry-wide Human Resources Planning Initiatives expand the base of employers investing in training by developing partnerships with employer groups and industry associations to encourage long range human resource planning within economic sectors.
- ❖ Labour Market Development Agreement supports skills development
- ❖ Aboriginal Apprenticeship Program
- ❖ Trades Qualification upgrading
- ❖ Senior Years (high school) Apprenticeship Option Program (for Youth)
- ❖ Community-based employability programs, community partnership projects to develop and deliver training, work experience and employability skills training
- ❖ Basic, intermediate and advanced ESL and ESL literacy programs
- ❖ Immigration Support Programs

In 2004, the Ontario Government undertook a comprehensive review of adult education. The goal of this review, which will eventually guide policy and program development, was:

- ❖ The government is committed to providing Ontarians with access to an adult education and training system that addresses current and anticipated economic challenges. (Ontario, 2004, p. 1)
- ❖ The results of the review will be used to inform the creation of new policies without hopefully increased expense to the province and still providing flexibility and support to the citizens of the province.

Saskatchewan has also launched its own policy and program review through their Adult Learning and Adult Education Project. The project addresses issues of basic skills development, investment in human resources, innovation in teaching and learning, how to increase the value and visibility of learning in the province, provision of career guidance and counselling services and the goal of providing learning opportunities closer to home.

Quebec has one of the most extensive adult education systems in Canada. The province is over halfway through implementation of the five-year action plan (2002-2007) under the government's adult and continuing education policy, focusing on lifelong learning. The ministère de l'Emploi, de la Solidarité sociale et de la Famille and Emploi-Québec are active in supporting continuing education in Quebec to foster the development and delivery of manpower training. The government requires companies with a payroll over \$1,000,000 to invest 1% of their payroll in employee training. Employers who do not meet this requirement must pay the shortfall between their investment in training and 1% of their payroll to the Fonds national de la formation de la main-d'œuvre.

In Quebec, adult and continuing education are based on the following guiding principles:

- ❖ Knowledge must be accessible to and shared by all in order to foster individual realization, economic development and social cohesion.
- ❖ Youth and continuing education are two stages in a lifelong learning continuum.
- ❖ The right to education must translate into actions to increase demand for learning, in order to provide for lifelong learning and successful completion of training plans by individuals.
- ❖ Government must assume a central role in adult and continuing education in a context of consultation and partnership.
- ❖ Government and other organizations and networks are responsible for implementing adult and continuing education, together with recipients of education, their instructors, professional and trade associations, unions, socio-economic associations, employers and citizens at large.

The New Brunswick government provides a grant to Literacy New Brunswick Inc., an NGO that delivers adult literacy and basic education programs through community based classrooms that are delivered under the auspices of the Community Academic Services Program. The government also has employment assistance programs that, under certain circumstances provides eligible adult learners tuition funding and in some case living allowances while attending education and training programs.

Launched in 2001, the Nova Scotia School for Adult Learning (NSSAL), a coordinating initiative within the Department of Education, is an example of best practice in literacy as it embodies key elements such as financial accessibility, funding and delivery partnerships, recognition of learning and coordination/continuum of service to adult learners. Prior to 2001, the literacy service providers often operated in isolation of each other, and there were few learner transitions between programs and limited formal recognition of learning. Through NSSAL, the Province funds community-based organizations, community colleges and school boards to offer tuition-free educational programs for eligible adults, ranging from basic literacy to high school equivalency and completion. The Nova Scotia High School Diploma for Adults, the 12 credit credential offered through the School for Adult Learning, incorporates recognition of learning principles and articulates two formerly distinct programs: the Public School Program offered by school boards, and the Adult Learning Program offered by the colleges. Previous formal learning may also be accredited if eligible through a transfer credit process and "dual crediting" is also an option.

Nova Scotia reported that its Workplace Education Program draws its success and strength from a partnership model that encourages government, business and labour to invest in education and training, and cultivates a culture of learning within workplaces. Organizational needs assessments are conducted and programs are then customized to meet the needs of both the participants and the workplace or industry sector. The flexibility of the model allows it to respond to the needs of small to large businesses, to displaced workers, as well as to the needs of specific industry sectors. Examples of best practices in this area include a Small Business Essential Skills Initiative which focuses on the needs of the small business owner/operator and an Apprenticeship Essential Skills Initiative which helps apprentices succeed in the technical portion of their apprenticeship training. The Province has also introduced a One Journey-Work and Learn Project enabling individuals on income support to participate in a customized essential skills program to link them into employment positions with industry.

Nova Scotia also noted that The Department of Education is exploring the initiation of an adult literacy and/or lifelong strategy framework. They indicated that the department has recently strengthened the capacity of the community college to offer programs through new

investments in infrastructure which will, in turn, lead to increased seat capacity. The department will also enhance investments in the Nova Scotia School for Adult Learning by providing funds to colleges, school boards and community groups to provide tuition-free literacy and ABE programs. Nova Scotia is in the process of conducting research and consulting stakeholders to initiate a PLAR framework for the province.

Newfoundland and Labrador will soon release its White Paper on Post-Secondary Education. The Terms of Reference address quality, accessibility and affordability in all educational sectors and for all individuals, including those without the minimum academic requirements for post-secondary education

Table 2: Comparison of Adult Education Program Offerings

Program Type/ Jurisdiction	Adult Basic Education/ Literacy	High School Equivalency or GED	Language Training/ESL/ FSL/ First Nations Language	Vocational Training/ Apprenticeship/ Job Preparation	Career & Employment Services and University Participation	Extension and Continuing Education	Citizenship Programs
British Columbia	Basic Skills Development Literacy Now Program Advisory Council on Literacy Inmate Literacy Programs Adult Basic Education Program School District ABE Programs	Adult special education services (through post-secondary institutions) to support academic skills development Transition to Post- Secondary Education Programs; Adult Graduation Diploma – available in both school districts and post- secondary institutions	Basic, Intermediate & Advanced ESL Programs	Adult special education services (through post-secondary institutions) to support: employment preparation; & vocational training; Entry Level Trades Training and Apprenticeship programs; Accelerated Credit Enrolment in Industry Training (ACE IT) program; Secondary School Apprenticeship (SSA) program; SSA scholarships	Transition to Work Programs; Strategic Investment Plan to add 25,000 additional spaces to BC public colleges, university colleges, institutes and universities by 2010; BC Student Assistance Program	Most public post-secondary institutions offer continuing education	BC Settlement & Adoption Program



Program Type/ Jurisdiction	Adult Basic Education/ Literacy	High School Equivalency or GED	Language Training/ESL/ FSL/ First Nations Language	Vocational Training/ Apprenticeship/ Job Preparation	Career & Employment Services and University Participation	Extension and Continuing Education	Citizenship Programs
Alberta	Non-credit adult learning opportunities in basic literacy. Tutor support for adult literacy programs	Alberta Works, to upgrade academic credentials	Non-credit adult learning opportunities in ESL/FSL.	Apprenticeship Access Fund Apprenticeship and Industry Training Scholarships Registered Apprenticeship Program Youth Apprenticeship Project Access to career, workplace and labour market information Alternative delivery initiatives	Student Financial Assistance Program Post-Secondary Access Fund Raising Awareness About Planning for Post-Secondary Studies Initiative Non credit adult learning opportunities in employability enhancement Labour Market Agreement for EI recipients. Alternative delivery initiatives	Non credit adult learning opportunities in continuing education Community Adult Learning Councils Alternative delivery initiatives	
Saskatchewan	Literacy Skills Development Programs	Education programs to achieve high school equivalency		Job Start/Future Skills Program Labour Market Development Agreement to support skills development	Canada-Saskatchewan Career & Employment Services	Funds provided to universities/ SIAST to respond to lifelong learner needs	

Program Type/ Jurisdiction	Adult Basic Education/ Literacy	High School Equivalency or GED	Language Training/ESL/ FSL/ First Nations Language	Vocational Training/ Apprenticeship/ Job Preparation	Career & Employment Services and University Participation	Extension and Continuing Education	Citizenship Programs
Manitoba	Adult Literacy Programs	Adult Learning Centres Senior Years (high school) Apprenticeship Option Program	Basic, intermediate and advanced ESL literacy programs	Workplace Education Labour Market Development Agreement to support skills development Industry-wide Human Resources Planning Initiatives Aboriginal Apprenticeship Program Trades Qualification upgrading		Prior Learning Assessment and Recognition Strategy	Immigration Support Programs
Ontario	Literacy and Basic Skills Program.			Apprenticeship Training Tax Credit to encourage the hiring and training of apprentices. Apprenticeship Scholarship and Signing Bonus			
Quebec	Literacy and Basic Skills Program	Education programs to achieve high school equivalency	Language Training	Job Training Tax Incentives Apprenticeship Training Programs		Non credit adult learning opportunities in continuing education PACATE Programs	Immigration Support Programs

Program Type/ Jurisdiction	Adult Basic Education/ Literacy	High School Equivalency or GED	Language Training/ESL/ FSL/ First Nations Language	Vocational Training/ Apprenticeship/ Job Preparation	Career & Employment Services and University Participation	Extension and Continuing Education	Citizenship Programs
New Brunswick	Literacy Grants to NGOs	Education programs to achieve high school equivalency or a GED					
Nova Scotia	Adult Learning Program – Levels I to IV (Literacy and ABE) Public School Program Workplace Literacy Family Literacy	Education programs to achieve GED (high school equivalency ) NS High School Graduation Diploma for adults offered by colleges and school boards	Basic ESL Programs	Labour Market Development Agreement to support skills development Apprenticeship Training Programs Employment readiness/ life skills	Student Assistance Program Employment/ Career counselling	Non credit adult learning opportunities offered through school boards, colleges and universities	Immigration support programs
Prince Edward Island	Literacy and ABE Programs Workplace Literacy Programs Support for the training of literacy tutors Project LOVE, a community based program to upgrade reading skills	Education programs to achieve high school equivalency or a GED		Labour Market Development Agreement to support skills development			

Program Type/ Jurisdiction	Adult Basic Education/ Literacy	High School Equivalency or GED	Language Training/ESL/ FSL/ First Nations Language	Vocational Training/ Apprenticeship/ Job Preparation	Career & Employment Services and University Participation	Extension and Continuing Education	Citizenship Programs
Newfoundland and Labrador	Basic Literacy and ABE 1 programs through NGOs. Strategic Literacy Funding Committee ABE programs for those on income support	Major review of ABE Level II and III curriculum  High school equivalence through GED		Labour Market Development Agreement to support skills development MOU between apprentices and their employers Apprenticeship and Certification Website project to provide guidance to apprentices as they pursue their journeyperson certification	Financial support to income-support clients in re- employment community partnership initiatives and ABE  Student Investment and Opportunity Corporation: programs such as Student Work and Services Program	Non-credit continuing studies through public post- secondary institutions	
Northwest Territories	Adult Literacy and Basic Education Programs delivered by Aurora College Community Literacy Projects			Labour Market Development Agreement to support skills development			
Nunavut	Community Based Literacy Programs			Labour Market Development Agreement to support skills development			

Program Type/ Jurisdiction	Adult Basic Education/ Literacy	High School Equivalency or GED	Language Training/ESL/ FSL/ First Nations Language	Vocational Training/ Apprenticeship/ Job Preparation	Career & Employment Services and University Participation	Extension and Continuing Education	Citizenship Programs
Yukon				Financial assistance to Apprenticeship Programs and Labour Market Development Programs	Student Financial Assistance		

## LIFELONG LEARNING INITIATIVES

Governments throughout Canada are trying to decide how to embrace the concepts of lifelong learning. The most typical way reported in the survey was to expand the mandate of existing colleges and universities and provide them with sufficient funds to grow their continuing education offerings, support distributed learning programs and design and deliver targeted applied certificate and diploma programs. This lifelong learning approach is very much still part of the formal education system.

Several respondents noted that their governments have incorporated lifelong learning goals into their education plans. They indicated that the Saskatchewan's Learning Sector Strategic Plan states, "Through lifelong learning, all Saskatchewan people become knowledgeable and skilled citizens contributing to and benefiting from society and the economy".

Some governments have undertaken initiatives that will help establish a lifelong learning framework. Some of these initiatives are:

- ❖ Saskatchewan has established a process of prior learning assessment to support the development of a skilled and responsive labour force.
- ❖ PEI provides free literacy upgrading programs to all its citizens, no matter the age or employment status.
- ❖ Alberta provides government support to 70 communities through their Community Adult Learning Councils and volunteer literacy tutor program. In addition, they provide information to potential lifelong learners through their Labour Market Information Centres and the Alberta Learning Information Service.
- ❖ Manitoba reported that they support the Healthy Child Initiative which provides funding to regional parent-child coalitions to support initiatives in four program areas: parenting, literacy, nutrition, and community capacity as identified in the region. They also have created and support the National Child Benefit Employment Program which provides income assistance and lower income parents opportunities to participate in training and employment initiatives.
- ❖ The New Brunswick Public Library system and Connect NB Branché (a Branch of TED's Adult Learning and Skills Division) encourages people of all ages to participate in informal learning programs. The system is involved in all aspects of adult learning including giving adults opportunities to become comfortable in an online environment.
- ❖ Newfoundland and Labrador provides grants to adult literacy centres to support basic literacy instruction. In addition, the province, with federal support, has established 165 Community Access Program (CAP) sites that provide opportunities for citizens throughout the province to develop computer skills and learn about the benefits of using information technology.
- ❖ In British Columbia, communities were provided with funding to develop literacy plans through the Literacy Now initiative. A Literacy Summit was held to focus attention on the issue and a Premier's Advisory Panel on Literacy was established to assess the most urgent needs in literacy and recommend actions for improvement. The provincial government also provided grants to 44 adult literacy programs offering a range of services including family literacy and literacy tutoring. Through the Libraries Without Walls initiative, over the next three years British Columbia will provide broadband internet access in every public library, as well a 24 hour virtual reference desk and a one-card system which will give all British Columbians access to books from every public library in the province.

The role of non-government agencies, the local communities and the business community in the provision of adult learning programs is not yet part of the larger strategy of creating a lifelong learning community. At best governments at all levels provide one-time sub-contracts, grants or loans to organizations to support local lifelong initiatives.

The Quebec government provides extensive support for lifelong learning and informal learning experiences through the PACTE (Politique gouvernementale. L'action communautaire : une contribution essentielle à l'exercice de la citoyenneté et au développement social du Québec). The PACTE oversees the work of non-government agencies in the provision of informal learning experiences.

Quebec and Manitoba reported that they had established a PLAR system to support its lifelong learning goals. The principles that govern the Quebec's actions in the area of prior learning and skills recognition are:

- ❖ Everyone is entitled to formal recognition of prior learning and skills that match elements of training leading to a qualification, based on evidence of such learning and skills.
- ❖ No one is required to repeat, in a formal educational setting, learning acquired elsewhere in a different manner.
- ❖ No one is required to obtain recognition again for skills or learning that have already been assessed rigorously and recognized by an official system.

Manitoba's PLAR includes the following three cornerstones:

- ❖ Increasing capacity within Post secondary institutions (PSI) to offer PLAR services
- ❖ Expansion of PLAR Advisory and Assessment services in the connection with the network of ALCs
- ❖ Industry PLAR Activity

## **ROLE OF THE PRIVATE SECTOR AND NGOs**

As noted earlier the role of the private sector and non-government organizations in the development, delivery and management of adult learning programs is not well defined. In some jurisdictions, like Alberta, tax incentives have been provided to employers to support apprenticeship and back to work programs. Again in Alberta, community based councils have been established that include participants from NGOs, local community governments and the private sector.

Manitoba reports that it supports Industry training Partnerships (ITP) which provides consultation and expertise to business, labour and government regarding PLAR for industry-initiated projects, coordinates the development of industry-based PLAR projects and facilitates practitioner development.

## **FEDERAL GOVERNMENT INVOLVEMENT**

The Federal Government was invited to participate in the survey, but at the time of publication of this report their response had not been received. Since the Federal Government is both directly and indirectly involved in the provision of adult education and training services, the research team completed a review of government web sites to identify the policies and programs supported by the Federal Government.

During the web site review, the research team found that the following government departments were engaged in adult training, vocational training and human resource development program delivery and support: Human Resources and Skills Development Canada; Industry Canada; and Statistics Canada.

### **Human Resources and Skills Development Canada**

HRSD provides support for a number of training, learning and vocational programs targeted at adult learners across Canada. These include:

- ❖ Skills Link and Career Focus which provides a variety of services to youths (15 to 30) to overcome barriers to employment by helping participants obtain knowledge and develop skills and work experience that will help them participate in the job market.
- ❖ The National Literacy Program provides grants and contributions to the provinces and territories to support the growth of literacy across Canada.
- ❖ The Employment Partnership Initiatives and Funding Programs such as the Inter-provincial Standards (Red Seal) Program are targeted at supporting a tradesperson's ability to move freely about Canada without additional certification.
- ❖ The Learning Initiatives Program promotes a lifelong learning culture in Canada through a variety of private sector and academic projects.
- ❖ Career Awareness Programs are delivered through different sector councils, provincial or territorial bodies and industry partners to provide career options and training support for targeted participants.
- ❖ The Employment Assistance Programs and Multilateral Framework for Labour Market Agreements assist people with disabilities who wish to become active members of the labour force.
- ❖ Summer work programs provide practical experiences to students completing their post-secondary education.
- ❖ Job Creation Partnerships support the creation of local employment opportunities for unemployed Canadians.
- ❖ Skills Development Programs provide guidance and training support to unemployed individuals with no marketable skills.

### **Industry Canada**

Industry Canada oversees a number of strategies and programs that have the potential to directly impact and improve the adult education, vocational training and lifelong learning environments across Canada. These include:

- ❖ Canada's Innovation Strategy is a multi-jurisdictional strategy that provides guidance to the use of technologies to support learning, the promotion of continuous learning as a desired goal for Canadian society, and provides support to a knowledge based and highly skilled workforce.
- ❖ Canada's Broadband for Rural and Northern Development is a program that will result in the provision of the hardware and infrastructure needed to support alternative delivery methods such as distributed learning and other technology based learning and collaborative environments.



### **Statistics Canada**

StatsCan collects and provides data, conducts research and produces publications on the state of the education community across Canada. The department has produced a number of useful tools such as e-stat, which helps educators better understand the demographics and trends in their target populations, include adult learners across Canada. They provide a number of free online resources including Education Matters: Insights on Education, Learning and Training in Canada.

### **Other Departments**

The federal government is one of the largest employers in Canada and as such has undertaken a number of human resource development initiatives to support its adult learning population. The new Canadian School of Public Service has been established to foster the effective growth and professional development of public servants. The school has been mandated to deliver programs using a variety of different learning strategies.

The Department of National Defence has begun the process of developing a Distributed Learning Network or DLN that will provide distance delivered courseware and other learning experiences to the almost 100,000 military and civilian personnel across Canada and abroad. They have gained a specific knowledge of e-learning specifications and standards and their impact on the design, development and delivery process.

These federal government departments should be encouraged to share their experiences about the design, delivery and management of adult education, training and career development programs with their provincial and territorial counterparts.

## **THE FUTURE – ONGOING INITIATIVES**

The majority of respondents reported that they have undertaken initiatives to enhance their government's adult education agenda. Most governments have undertaken a fundamental review to define their adult education and lifelong learning goals and determine how to structure their formal, informal and non-formal education and training environments to support these goals. Some the initiatives reported in the survey were:

- ❖ The Northwest Territories noted that they are in the process of program consolidation to maximize the available resources. Senior Literacy, Community Literacy, Workplace Education and Community Skills for Work programs have been consolidated.
- ❖ British Columbia reported a number of current and future initiatives to enhance adult education within the province. These initiatives included: the provision of an additional 25,000 post-secondary seats by 2010; entering in a Memorandum of Understanding on Aboriginal Post-secondary Education and Training with the federal government, representatives of British Columbia post-secondary institutions and a number of Aboriginal organizations; implementation of the Accelerated Credit Enrolment in Industry Training program whose aim is to increase youth participation (19 or younger) in industry and apprenticeship programs; expansion of the Adult Graduate Program to increase student completion rates; and support for a number of distance learning infrastructure programs and the introduction of BCCampus as the lead agency for distance delivered adult education programs.
- ❖ Alberta reported several provincial initiatives that will have impact on the adult learning community. The Human Resources and Employment Department has launched an internship program for skilled foreign trained immigrants and they have expanded access to the number of distance learning programs offered to adult

learners throughout the province. Finally, Alberta is conducting a project to identify the best practices required to enhance training and employment opportunities for persons with disabilities.

- ❖ Saskatchewan reported a number of current or future initiatives that will have a major impact on their lifelong learning agenda. These initiatives include an Adult Basic Education Redesign that will address the curriculum needs of Aboriginal learners and the ongoing continuing development of a provincial Literacy Strategy. The province has produced a Career Development Action Plan to develop an integrated career development system. As noted earlier, Saskatchewan has also established and will continue support a Prior Learning Assessment Recognition process to identify and document informal and experiential learning and apply them towards post-secondary credit. Finally, the respondents reported that the province has undertaken a number of coordinated projects to build local community capacity for essential workplace skills and promoting the use of these skills within the community and in existing training programs.
- ❖ Manitoba reported that they are facilitating the integration of adult literacy and adult learning centre programming to provide greater alignment in programming and a smoother pathway for learners to transition and progress on the learning continuum.
- ❖ Ontario noted that it recently completed a major review of the post-secondary system that will have impact on the provision of adult education and lifelong learning opportunities.
- ❖ As noted earlier in the report, PEI will continue to support and expand the Literacy and Adult Basic Education programs that respond to Islander needs.
- ❖ Newfoundland and Labrador report that their Education Department has restructures to include a Division of Adult Learning and Literacy which provides research and policy development support for all areas of adult education. In the near future, the Department will also release its White Paper on Post-Secondary Education that will address quality, accessibility and affordability in all educational sectors and for all individuals, including those without the minimum academic requirements for post-secondary education. The Department is presently undertaking a province-wide survey to examine barriers to the participation of adults in education and lifelong learning. The study will create a database which will be used to inform policy and program development. In addition, the Province is completing a pilot project of new curriculum for ABE Level I, is undertaking a comprehensive revision of the ABE Levels II and III curriculum, is exploring the potential of creating a GED preparatory Program and the potential of partial delivery of ABE Level I through the use of distance technology.

## BARRIERS TO SUCCESS

The survey participants were asked to identify “the major barriers to the delivery and management of existing adult education programs and/or the creation of new adult education programs to better support the needs of their constituents”. Responses varied by each jurisdiction. Below are the major barriers (in no particular order) identified by the survey respondents.

1. Provincial and Federal Capacity - There are overall capacity pressures in our system, demonstrated by unmet learner demands and anticipated unmet labour market demands. As the demands for highly skilled workers increases, there will be increasing demand for programs and services – particularly in the trade and technical

areas. The learning sector is challenged to meet that demand without increases in capacity, which could take the form of infrastructure expansion, increased reliance on technology-enhanced learning, or enhancing the ability of institutions and/or employers to recognize and assess prior learning.

2. Institutional Capacity - Similar to the issue above, high demand from the baby-boom echo and from adults taking up educational opportunities means increased pressure on academic spaces. Financing capital construction and operations to meet the demand is a challenge. It is possible to rely to some extent on tuition fee increases to support expanded operations (where physical capacity exists) but institutions need to be careful not to drive up tuition fees to a level that acts as a disincentive.
3. Provincial and Federal Jurisdiction Issues - Jurisdictional issues with regard to Aboriginal people, on and off reserve, have been a barrier to the development, delivery and management of adult education programs. Treaty First Nations envision a system in which Treaty First Nation and non-Treaty First Nation individuals would be able to choose the school that they wished to attend. In urban areas, for example, there would be institutions under Treaty First Nation jurisdiction, institutions under provincial jurisdiction, and institutions in which jurisdiction would be shared between Treaty First Nations and the provincial government. First Nations educational institutions at all levels would be open to all individuals, and enrolment would be a matter of individual choice.
4. First Nations Education System – It is of some concern how Treaty First Nations organize themselves to pass laws respecting education within First Nations jurisdictions. Questions about how Treaty First Nations would address the matters of teacher accreditation, curriculum and curriculum development and monitoring and evaluation are still unanswered. As well, mechanisms to allow for harmonization with other government educational systems (for example, establishment of education level equivalencies or standards and free movement of students between First Nations and provincial post-secondary institutions) are part of the education specific jurisdictional discussions. It is also important for the new or existing system to provide strategies for increasing First Nation students' completion rates and supporting their transition to work. Finally, these jurisdictional issues are directly tied to the financing of public and post-secondary education, which includes unresolved issues such as the federal responsibility for funding Aboriginal people on or off reserve.
5. Individual's Access to Information and Resources for Existing Programs - There are barriers relating to an individual's access to information, particularly for career development information and programs. These barriers can be addressed in many ways, including improving the promotion and distribution of informational resources within both the learning sector and the general public.
6. The Funding Model – A potential barrier to the delivery and management of existing adult education programs is the current provincial/federal funding model. As it now stands, 75% of the funds for the Literacy/ABE Program come through the Labour Market Development Agreement. That means the majority of the funds are targeted at EI eligible participants. This EI attachment criterion is a significant barrier for access to the program by other interested participants who are drastically in need of literacy learning opportunities or those who are attempting to acquire a grade 12 equivalency. Provinces and territories are faced with the problem of not being able to service the number of non-EI eligible personnel because the seats must be saved for

EI eligible applicants. Other sources of Federal funding are often reserved for new and innovative programs and not existing adult education programs that require ongoing multi-year funding.

7. Apprenticeship/Trades Training – Improving the image of apprenticeship/trades as an area for employment remains a challenge. There is still a strong bias on the part of parents and students towards a university education as the only route to employment and personal well-being. Significant effort needs to be put into encouraging high school students to see the trades as a viable alternative to university or direct entry into the workforce. Governments must also establish incentives that convince employers about the value of hiring apprentices. Many smaller employers are reluctant, or unable, to invest the time and resources to take on an apprentice. This reluctance is compounded by concerns that larger employers could well ‘poach’ apprentices leaving the small company with little or no return on their investment.
8. Needs of Rural Populations - Even though the public school system, community colleges and universities have expanded their programs to support the needs of the more sparsely populated rural areas of our provinces and territories many of our citizens still do not have access to appropriate education and training programs. The demands for adult education programs in small centres, rural areas and remotely isolated Northern communities tend to be broad but shallow (in that there are not large numbers) and this often means that the critical mass for face-to-face instruction cannot be attained. Online learning and its supporting infrastructure must be expanded to support all communities, no matter the size and location, throughout Canada.
9. Integration of New Citizens - Language and cultural barriers remain an issue for new immigrants. These challenges will only grow as the need to import more skilled people rises. Integration into society and the local economies of skilled immigrants currently presents difficulties because of the inability or unwillingness of many professions to recognize overseas credentials or experience.
10. Foundation in Adult Learning – Policy frameworks (no matter whether Pan-Canadian, provincial or territorial) must be developed using adult education principles that ensure programs are learner centred, cost effective (for the learner and the funding agency) and, where and when appropriate, demonstrate regular learner progress.
11. Infrastructure – There is a need for increased infrastructure to address unmet learner needs. New adult education facilities must be created, existing facilities enhanced and technology upgraded to support effective distribution to individuals, employers, NGOs and the others interested in adult education and lifelong learning.
12. Adult Education Research – A number of Adult Basic Education pilot programs have resulted in very low enrolments of adults in locations where local education statistics indicate significant levels of adults with less than a high school education. The question arises – despite an apparent need why is the enrolment in adult education programs so low? Without appropriate research it is difficult for each jurisdiction to develop suitable policies and programs targeted at specific populations. Although some research endeavours will attempt to address the need for information to support policy and program development there is a need for a wider and effectively funded national, provincial and local research agenda that addresses the issues of adult education and lifelong learning. Second, there is a need for a mechanism to

widely report and share the findings of this research and other relevant information to the managers and providers of adult education policies, programs and funds.

13. Training Capacity of Small Jurisdictions – Smaller territories and provinces report that they do not have the financial and infrastructure capacity to support the delivery and management of extensive adult education programs. Financial and infrastructure assistance from other governments is essential if adult education programs are to be delivered to all constituents in an equitable manner.
14. Differing Needs of Northern Communities – Although alluded to in other discussions about barriers, it should be noted that all of the northern territorial respondents indicated that Northern citizens are both geographically and culturally unique and may require a different approach to adult education programs than their southern neighbours.
15. Quebec Position - Quebec insists on retaining control on design and management of its adult education policies and programs and therefore believes that a pan-Canadian strategy is inappropriate and that it would be preferable to agree on ways to exchange expertise between provinces to foster the development of adult education in Canada.

## FINDINGS

The results of the provincial/territorial survey have led to a number of general findings that must be considered as each province or territory moves forward to create strategies for the implementation of adult education and lifelong learning policies and programs.

- ❖ Within Canada, no single definition or model exists to support the implementation of adult education programs. If a Pan-Canadian policy framework is to be developed then a set of common building blocks (definitions, taxonomies, typologies, and others) must be developed before proceeding.
- ❖ There is no legislation that exists in any jurisdiction that specifically mandates the role of adult education and lifelong learning to support its citizens. The responsibility for the management and delivery of adult education services and programs is embedded in a number of different legislative programs, many of which are only a very small part of a larger public and post-secondary education policy framework.
- ❖ In most large provinces and to some degree within the Federal Government, no single ministry/department had sole responsibility for the development, delivery and management of provincial adult education programs or the provision of support for adult learners. Based on program descriptions there at times appeared to be an overlap in responsibilities.
- ❖ There appeared to be some confusion over jurisdiction and funding of adult education programs. Issues of federal-provincial jurisdiction must be resolved and clear roles for all partners in the development, delivery and management of a Pan-Canadian adult education framework must be defined.
- ❖ Several provinces and territories have undertaken a review of adult education within their jurisdictions. These reviews are attempting to address many of the issues raised in this survey and it is anticipated that each will result in a strong commitment to adult education and lifelong learning.
- ❖ Existing adult education programs across Canada seem to concentrate on support for literacy, adult basic education, vocational training, high school equivalency/GED,

and language training. Almost all of these programs are delivered in a formal or non-formal education environment. Recognition and support for informal lifelong learning programs and experiences appear to be under funded or not supported at all. Part of this problem occurs because of a conflicting understanding of what informal lifelong experiences consist of and how to recognize them.

- ❖ Almost all programs seemed to have an underlying economic outcome: high school completion, employment, or post-secondary participation. We found no programs that were supported by government that encouraged “learning for learning’s sake”.
- ❖ A number of issues that act as barriers to going forward must be resolved between the provinces, territories and Federal Government before proceeding to the creation of a Pan-Canadian adult education framework.
- ❖ The North is unique and a Pan-Canadian adult education framework must take into consideration the geographic and cultural differences of the three territories.
- ❖ Quebec has unique cultural and language goals for its adult education and lifelong learning programs.
- ❖ Quebec has unique cultural and language goals for its adult education and lifelong learning programs. The Quebec Government appears to have the most extensive and integrated adult education and lifelong learning approach which is supported by specific legislation, policies and has an appropriate infrastructure to design, deliver and manage the programs.

## ADULT EDUCATION: TERMINOLOGY AND DEFINITIONS

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### INTRODUCTION

*Adult learning and education have always played a significant, if undervalued, role in the development of this nation's economic strength and formation of its multicultural traditions. The demands of the 21<sup>st</sup> century have placed renewed emphasis on the role and importance of learning broadly and adult learning in particular as a key agent in this nation's renewal and revitalization. (Council of Ministers of Education, Canada, 2004, p. v)*

*Education and learning are not objectives in themselves. They are the mechanisms for individual and community development, for active citizenship building, and for improving the lives of people. Thus they must be explicitly framed within and oriented toward social transformation and human development. (Torres, 2002, p. 23)*

The above quotation from Torres on adult education was chosen to illustrate the thinking reflected in this foundational section of the report. Adult education, from a historical perspective, has experienced ideological shifts in its brief history. There has traditionally been recognition of a dual role for adult education: (1) education with a relatively narrow economic focus of improving basic skills for workforce access, advancement, and/or performance enhancement, and (2) education following a broader, utopian perspective of self-improvement, democratic participation, and advancement of the civil society (Cruikshank, 2002).

While these dual roles have been balanced throughout most of the past century, the last two decades have witnessed the predominance of one role – that of workforce and labour related initiatives based on an economic or market agenda, driven by societal issues of the knowledge economy and globalization. This predominance, in terms of policy initiatives, structural frameworks, and ideology evidenced throughout Europe and in North America, has resulted in an unbalance. The second and equally important role of adult education – the more utopian role of educated citizens and improved civil and social order, and improved quality of life for all, is in danger of being subsumed within the overarching thrust of the economic model. As Martin (2000) notes:

*Adult education should help people to engage in a wide range of political roles and social relationships which occur outside the workplace and the marketplace. It is this more holistic and civic sense of what it means to be human to which the radical and social purpose of adult education has always spoken – with clarity and conviction. (p. 255)*

The concern for the denigration of that second, more utopian role is evidenced in the recent literature on lifelong learning, adult learning, and adult education. There is, in the literature, a growing demand that the self-directed development, educated citizenry, civil society role of adult education be recognized, be valued, and be placed prominently within developing policy frameworks. The emerging theme is education for living, not just for earning a living.

## TERMINOLOGY OF ADULT EDUCATION

The literature on adult education is interspersed with terminology that is used sometimes synonymously, and sometimes to differentiate among the nuances of an entity of considerable history, great diversity, and complexity. For decades the terminology has been debated, with various authors and reports occasionally attempting to develop universally accepted definitions of key terms. The problems of terminology and universal meaning are evidenced in the current literature, and perhaps the lack of commonly held definitions has exacerbated the clear delineation of roles, responsibilities, and policy across the various sectors of the adult education field.

Two terms are incorporated within all other terms, if not always overtly then by implication. These are *education* and *learning*. And so we shall begin by defining these two terms, in relation to the adult education literature.

Education for centuries was deemed teacher-centric. Both knowledge and pedagogy resided in the teacher – the person who led or directed those wishing to acquire knowledge – to learn. In our present era, it is recognized that access to knowledge is not reliant on a teacher. Nevertheless, a guide to knowledge is still often, for many, an efficient way of gaining knowledge and understanding. Education today still implies a structure of some sort, the purpose of which is to promote learning. Education can be defined as:

*The social organization of activities to promote participants' learning and understanding, and hence improve their quality of life (Jarvis, 1999).*

Learning occurs both through living, whether at home, the workplace or other location and through structured educational experiences. It can refer to the process of gaining knowledge and understanding, but it can also refer to the outcomes of education – the cumulative knowledge and understanding gained. It is any modification of an individual or group created through the acquisition of knowledge and understanding. A definition of learning that covers the entire life experience is:

*Whether formal, non-formal, or experiential, learning is the modification of individual or group behaviour or beliefs through the process of acquiring knowledge, skills, values, and attitudes.*

In defining adult education and associated terminology, it is necessary to strike a balance in terms of inclusiveness and succinctness. Definitions which are totally inclusive, can be non-functional because they are too unwieldy for everyday use. Definitions, which are too succinct, are likely to exclude key elements of the terms. Nevertheless, we believe that commonly held definitions of adult education and related terminology, in a country of such diversity with sectors of both shared and autonomous responsibility as Canada, will assist in moving the field of adult education in the direction of nation-wide policy development, infrastructure, and implementation. It is our aim to produce a working definition of adult education for the Council of Ministers – one that can be used operationally to further the work in policy areas across Canada.



## UMBRELLA TERMS

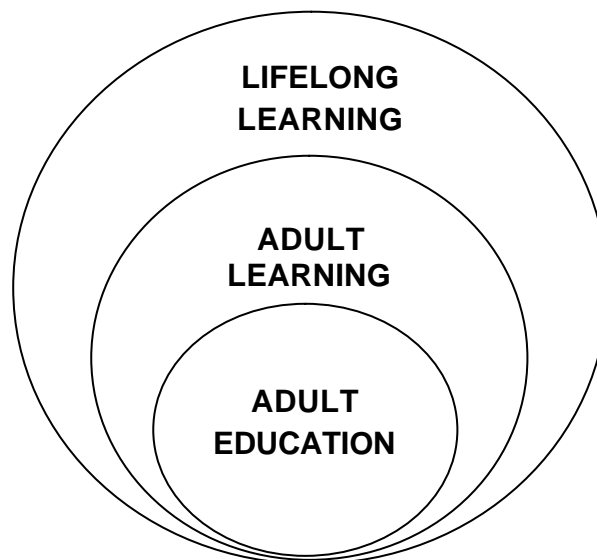
In the national and international literature of adult education, numerous related or inter-connected terms are evidenced. There are three umbrella terms as follows:

- ❖ Lifelong Learning
- ❖ Adult Learning
- ❖ Adult Education

The terms adult education, adult learning, and lifelong learning proliferate in the literature. These terms have emerged over the past century, with adult education being the predominant term for many decades. By the 1960s the term adult learning had emerged, and a decade later was in common use, reflecting the general paradigm shift in emphasis in all forms of education from teaching to learning, with the emergence and prominence of new learning theories. Also in the 1960s, particularly in Europe, the term lifelong learning began to appear with regularity in the literature, and has now become a dominant term. Of the original 452 journal articles initially reviewed by title and abstract for this section of the report, for instance, the term lifelong learning appeared in 56% of the titles or abstracts.

What do these terms mean to those who work in the field, and to those who have vested interest or responsibility for adult education? While the layperson might consider them to be equivalent, they are not. And while adult educators may have embraced the lifelong learning concept, they still desire a differentiation between it and adult education. The commonly accepted use of these three terms in the literature reflects a difference in breadth and focus. Figure 1 presents the relationship of these three umbrella terms, based on their breadth and focus:

**Figure 1. Lifelong Learning, Adult Learning, and Adult Education**



As illustrated in Figure 1, the concept of lifelong learning encompasses adult learning, since it refers to learning during the entire life span of an individual and adult education, since it promotes adult learning. Adult learning is considered to be a subset of lifelong learning – in that it is applied to learning only in the adult years. Adult education is considered to be a

subset of lifelong learning and adult learning, in that learning by adults occurs both within the framework of adult education, and also beyond it. These three concepts incorporate formal, non-formal, and informal or experiential learning.

## FORMAL, NON-FORMAL, AND INFORMAL LEARNING/EDUCATION

Formal, non-formal and informal are common ways to categorize adult learning and adult education, according to the literature, although it is doubtful that these categories are helpful in terms of developing a typography of adult education. Nevertheless, they need clarification and definition. For the purposes of this report, these terms are defined as follows:

**Formal learning or education** refers to structured and organized education, training, or professional development experiences that are provided through an educational institution, in the workplace or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.

**Non-formal learning or education** refers to any organized or systematic educational, training or professional development activity carried out in society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.

**Informal learning or education** refers to the process of acquiring knowledge, skills, and values from daily experiences at home, in the community, and at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that adults may seek out experiences to enhance their individual or collective learning.

Coombs and Lowe (as cited in Selman, Selman, Cooke, & Dampier, 1998), suggest that those responsible for educational policy in any society, in considering their educational systems and the allocation of resources, need to consider not only the formal education systems but also the network of non-formal and informal opportunities and capabilities of that society.

## LIFELONG LEARNING

In the past few decades the terms lifelong learning/education and, more recently, lifewide learning have been evidenced in the literature. Promoted by adult educators themselves, lifelong learning/education encompasses educational and learning events over the entire life span of individuals – hence adult education/learning can be seen as a subset of lifelong education/learning (Selman, Selman, Cooke & Dampier, 1998). Murphy (2000) notes, “lifelong learning has become enshrined in the law of states, local authorities, and regional bodies” (p. 166).

Lifelong learning has become a powerful umbrella term – at times threatening to replace adult education. As Rubenson (2002) notes, with lifelong as the one umbrella term “for all kinds of formal, non-formal and informal learning... there is a risk of losing sight of fundamental issues like equality and justice and a temptation to move public policy issues to the background” (p. 242). The spread of lifelong learning has meant that institutionalized education can no longer make claim to a monopoly over learning on the grounds that it is a formally constituted field.

Once learning is recognized and accepted as being located in a variety and diversity of social practices outside the institutional, a multiplicity of activities can involve learning and hence be deemed educational (Edwards & Usher, 2000).

Lifelong learning can be defined simply as learning on the part of the individual throughout his/her life span. Moreland (1999) notes "lifelong learning includes all learning which takes place from 'cradle to grave', although in practice it generally refers to learning which takes place beyond full-time, uninterrupted study" (p. 160). The Hyderabad Conference provides the following very inclusive definition:

*Lifelong learning ... leading to the creation of the learning society and learning community, offering all the opportunities to participate in and contribute to learning according to the needs and potential of learners, provides an overarching vision of education for all. This comprehensive vision of lifelong learning is necessary to empower people, expand their capacities and choices in life, and enable individuals and societies to cope with the new challenges of the 21<sup>st</sup> century. (UNESCO, 2002, p. 1)*

This all encompassing description, it should be noted, does not distinguish between learning and education.

Newer ideas on lifelong learning look beyond the linear progression of learning from birth to infinity. There is recognition that such learning has integrative as well as linear progression. Hence, the term lifewide learning, which has appeared in the literature over the past six years. As noted in the NYCI (National Youth Council of Ireland) Report (2001):

*The term lifewide learning comes closer to our own conceptual understanding, where formal, non-formal, and informal sectors offer alternative but complementary recognizable forms of education and training to all citizens... Lifewide learning is not only about learning skills in isolation to create a 'knowledge-based economy and society', but also about creating a 'social space' where communities and individuals can integrate, understand, and learn from each other. (p. 3-4)*

This vision of lifewide learning relates well to another phrase evidenced in the late literature – that of the learning society.

According to Johnston (2000), "lifelong learning has a horizontal as well as a vertical dimension – its comprehensiveness embraces learning that occurs in every aspect of life, at work, in the home, at leisure, at play" (p. 13). Lifelong learning can be viewed from three perspectives: the expansion of learning process in time, innovative practices to meet new and expanding needs, and integration – or an organizing principle of policy, agencies, and cooperative effort. This perspective is one of lifewide learning.

While the commitment to lifelong learning expressed by various levels of government of many nations is publicly evidenced in white papers and policy statements, the move toward implementation of these policy statements is not as evident. One major deterrent to implementation is financial. How does lifelong learning affect past assumptions and practices regarding who pays for learning of the citizenry? The OECD Report (2001) notes:

*Pre-school education and care is publicly financed in part or in whole in some countries. Public financed initial education is universally available at least through upper secondary education; at the tertiary level, it is publicly financed in*

*part or in whole, depending on the country. Labour market training for the unemployed is publicly financed. Lifelong learning may shift the usual balance between public and private funding of learning.... Lifelong learning occurs in a greater variety of settings than formal education, many of them non-public. What does this imply for who pays? (p. 16)*

Having synthesized the definitions and terms in the literature on lifelong learning, we recommend the following definition of lifelong learning be adopted by the CMEC:

**Definition: Lifelong Learning**

*The development of human potential through a continuously supportive process which stimulates and empowers individuals to acquire all the knowledge, skills, values, attitudes, and understanding they will require throughout their lifetimes as individuals, citizens, and workers.*

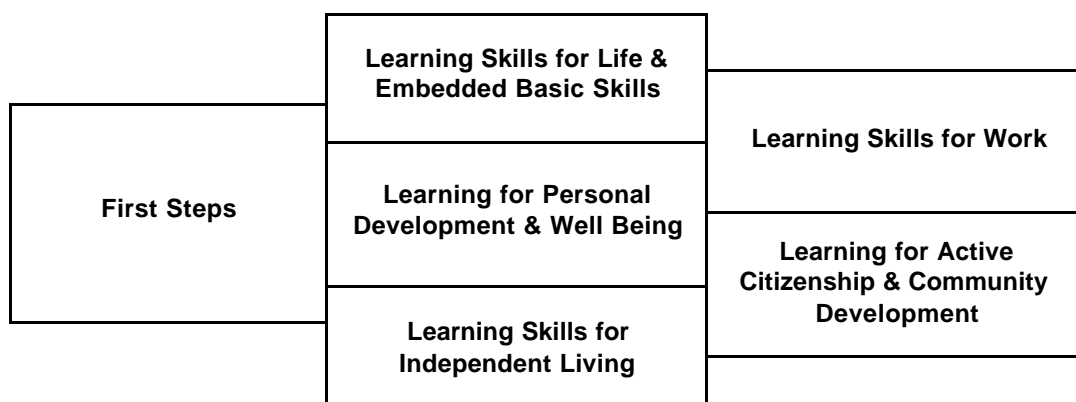
**ADULT LEARNING**

Increasingly learning is being promoted as a solution to economic and social problems. 'Learning' is replacing 'education' as the term of choice by politicians and business leaders, as evidenced by such terms as the 'learning society', 'learning organization' and 'workplace learning'. It is a shift that spans international and political boundaries [and] goes far beyond semantics, however, as evidenced by the number of profit-driven organizations... that have infiltrated the workplace and educational arena and transformed traditional, institutional sites of learning. (Spencer, Briton, & Gereluk, 2000)

Adult learning is recognized as a significant part of the philosophy and the process of lifelong learning. It is also recognized as context bound, in that the learning of adults does not occur in isolation from the other aspects of their lives. They learn for work, for living, and for their community involvement. Thus adult transformation through learning, on an individual basis, is intimately related to social transformation, because of the purposive and practical approach to learning engendered by many adults. The seeking out of meaningful learning experiences is noted by Baptiste, Lalley, Micalli, and Mushi (2002) who state, " We were surprised to discover how constraining the term adult learning could be. Employing it enticed us to focus myopically on cognitive elements... to the exclusion of such things as content and context. Fortunately, our respondents kept talking about their learning experiences in broader terms, incorporating content, context, and consequences of learning... the learning experiences of adults" (p.29).

Merton (2004, p. 8) describes a framework for adult learning in Figure 2.

Figure 2. Conceptualization of an Adult Learning Framework.



- ❖ **First Steps.** Learning which is offered as an initial entry point into learning and from which learners are actively encouraged and supported to progress to other forms of learning
- ❖ **Learning Skills for Life, and Embedded Basic Skills.** Learning for which the primary intention is to improve basic skills of literacy, numeracy, and/or second language for other language speakers.
- ❖ **Learning for Personal Development and Well Being.** Learning for personal development, cultural enrichment, creative stimulation or enjoyment, and for which there is no requirement that learners must necessarily progress to other learning.
- ❖ **Learning Skills for Independent Living.** Learning which develops the knowledge, skills, and understanding of adults with learning difficulties and disabilities, for independent living in the community or which supports adults in recovery to re-engage in learning.
- ❖ **Learning Skills for Work.** Learning which enables adults to develop the skills they need for paid or volunteer work, and which may enhance their employability.
- ❖ **Learning for Active Citizenship and/or Community Development.** Community-based learning developed with local input to build skills, knowledge, and understanding for community participation, involvement, and social/community action.

CONFINTEA V codified a paradigm shift from adult education to adult learning. This shift has, on the one hand, positive implications in terms of encouraging a wider, more holistic appreciation of education – one transcending the merely formal sector, unfolding as a lifelong process, responsive to the different needs and varying contexts of learners themselves. On the other hand, it threatens to transfer, especially in a globalized, market-oriented context, the onus of educational responsibility to learners, who increasingly must pay for service and for quality, along with civil society organizations (Synthesis Report, 2004).

Selman, Selman, Cooke & Dampier (1998) note “it is important to make the distinction between adult education and adult learning. Learning is the intended end-product of education” (p. 18). It is also more than that, however. In addition to the natural outcome of formal and non-formal adult education, it happens without the impetus of adult educational effort, whether informally, incidentally, or experientially through daily work and living activities. Adult learning is both related to, and independent of, adult education. According to the Hamburg Declaration (UNESCO, 1997), “adult learning encompasses formal and continuing

education, non-formal learning and the spectrum of informal and incidental learning available in a multicultural learning society” (p. 1).

Illeris (2000) states that there is a need for a broad comprehensive theory of adult learning, taking into account four elements: learning, personal development, socialization, and qualification. Governments and non-governmental organizations have different priorities for adult learning. Five areas which have been identified are:

1. Democracy and active citizenship.
2. Literacy and adult basic education.
3. Decent work environment.
4. Media and information and communication technologies.
5. The needs of special groups.

In relation to the latter, the move towards inclusion of Third Age learners, observed in the past decade, adds credence to the adult learning focus. As Withnall (2000) states “a novel way forward would be to change the emphasis from thinking about education to learning” (p. 37), and that the involvement of older people in learning whether in formal or informal contexts, needs to be located and justified within a life course perspective which would acknowledge the heterogeneity of the post-work population.

### **The Shadow World of Informal/Experiential Learning**

Informal learning encompasses non-taught or self-directed learning activities which occur through daily living and experiences, and which may be considered experiential in nature. Informal learning among adults is vitally important, as noted by Sparks (2000): “How we learn about our world, our place in it, our roles, and how to effectively function...it is often through informal learning situations that identity is formed and reformed, cultures are transmitted, relations are negotiated, and social action is initiated” (p. 428). Informal learning can be referred to also as experiential learning, and in fact that term may be more suitable as a descriptor for the vast array of learning that occurs as we live through our daily experiences.

The term experiential learning is, as noted by Fenwick (1999) “one of the most significant areas for current research and practice in adult education” (p. 1). The term is not limited to one use, but has been applied to non-directed life experience, special workplace training experiences interwoven with facilitator-led critical dialogues, learning through social action movements, and various team-building activities. Common to all applications is an understanding of experiential learning as in part reflective construction of meaning – and, beyond the individual, critical reflection and dialogue.

We too relate experiential learning to the current predominant learning theory of constructivism and contextualized meaning, with particular emphasis on ‘critical reflection’ and dialogue (Fenwick, 1999). Experiential learning is a process of making meaning from all experiences – cognitive, emotional, physical, social, and spiritual. Experiential learning is defined as: Learning that begins with experience and transforms it into knowledge, skills, attitudes, values, emotions, and beliefs (Jarvis, 1999).

Experience is noted by Usher, Bryant, and Johnston (1997) as having “a privileged place as the source of learning in a learner-centred pedagogy, and at the very centre of knowledge production and knowledge acquisition” (p. 205). Caffarella & Barnett (1994) provide five reasons why experiential learning is seminal to adult learning:

- ❖ Rich life experiences and background provide necessary building blocks for learning. Adults can reflect on past experiences to make and re-make meanings.

- ❖ Even when the actual experience is the same, different individuals construct different meanings. This implies that knowledge is constructed, not fixed.
- ❖ The learning process usually involves learners' active engagement. It is not sufficient to transmit information from one person to another. People construct meanings for themselves.
- ❖ Many learners want to be connected to others' learning. Group interaction is important.
- ❖ Adults' unique life situations form contexts for their learning. These influence the meaning they will draw from experiences.

However, experiential learning is more than simply having experiences as we live our lives. The experiences have to have meaning and be recognized as learning. Not all of our experiences equate with learning – or at least with learning that has any impact on us and on our community. Livingstone (1999) identifies four criteria for informal learning which help to make it both identifiable and authentic as a learning experience:

- ❖ Conscious identification of the activity as significant learning;
- ❖ Retrospective recognition of a new form of knowledge, understanding, or skill;
- ❖ Acquired on one's own initiative or self-directed;
- ❖ Recognition of the process of acquisition.

In this report we prefer the term experiential learning to informal learning, as we feel that experiential learning more closely describes the occurrence, and can in fact be made operational in terms of types of experiences that lead to learning, and in terms of developing evaluation schema which can take into account this valuable, and yet undervalued, learning.

**Definition: Adult Learning**

*Adult learning is the process or the result of adults gaining knowledge and expertise through practice, instruction, or experience. Adult learning may be intentional or non-intentional, may take place in a variety of settings, at home, in educational institutions, at work, or in the community.*

**ADULT EDUCATION**

The terms adult education and adult learning are widely used, sometimes without clarification between the two terms. However there is a difference. Adult education usually refers to models, planned activities, provisions, practices, and/or institutional structures to support and encourage adult learning. Adult education embraces the goal of bringing about learning for the benefit of the individual, the community, and society at large, in addition to the organization or workplace (Peterson & Cooper, 1999).

According to Statistics Canada (1999) "adult education encompasses all educational processes engaged in by adults which supplement or replace initial education" (n.p.). Adult education opportunities are provided through educational institutions, through employers and unions, through governments, and through community sponsored programs and non-profit organizations, and are funded through various means – the majority through public funds. Not all Canadians participate in formal adult education and training. However, it should not be assumed that adults in Canada are not learning through experiential learning. In fact, experiential education is an important source of skill formation in a modern society.

Experiential learning needs to be considered in any survey of adult education participation (Murray & Zeesman, 2001).

Despite agreement of adult educators on the need to differentiate between adult education and adult learning, frequently adult education is defined in terms of learning. The overlap in use of these two terms does not encourage clarity of language and terminology. For example, CEDEFOP (2000) defines adult education in terms of learning, briefly, as “systematic learning undertaken by adults who return to learning having concluded initial education and training”. (n.p.)

Poonwassie & Poonwassie (2001) define adult education in terms of forms: “skills training, professional development, personal development, leisure activities, and programs for ethnic groups, the elderly, and specially targeted groups” (p. 3). Torres (2002) offers a broader definition which includes forms, means, and players:

*Adult education is a broad field that includes basic and continuing education, vocational and technical education, higher education and professional development, and is offered through formal, non-formal, and informal education means, and by a variety of actors – the State, CSOs, and the market (p. 34).*

The trend in the past two decades of reorientation of adult education toward the needs of the knowledge economy as a result of technological advances and the globalization of trade still is evidenced in the literature. Murray and Zeesman (2001) focus on the Canadian perspective, in particular the economic viability of adult education. “The Canadian economy cannot rely as much as in previous decades on initial education to address the skill needs of the short and the medium terms. In this context, a greater share of the skills adjustment of the Canadian workforce will have to be achieved through training those adults who are already in the workplace” (p. 2).

In considering the role of experiential education, Harris (2004) notes:

*...adult education has no monopoly expertise in creating a learning architecture for large numbers of people. Adult education, however, has an excellent grasp of the profound learning that can be extracted from experience, collective reflection, and dialogue among peers in informal, casual, everyday settings. (p. 207)*

To consider adult education today is to be holistic, and to recognize that adult education is a process of cognitive, emotional, and spiritual dimensions; one which occurs not only in formal educational settings, but also, and integrally, in the workplace, the home, the family, and the community (Hayes & Flannery, 2000). There is, then, a focus back toward the individual and his/her needs in terms of self-actualization. This focus back is supported by the recognition that educated and knowledgeable individuals make for educated citizens and societies (Aggarwal, Fallis & Luker, 2000).

Foley (2004) identifies three recent changes in adult learning and adult education which are redefining its content and structure: the replacement of the general concept of adult education by various sector driven specialist fields such as HRD and workplace training, the increasingly sophisticated scope of international adult education research and scholarship; and the growing role that learning occupies throughout our lives. Added to these changes is the change brought about by new information and communications technologies in the past two decades. These are not only delivery systems or vehicles to carry adult education. They



are broadening and democratizing adult access to education and learning throughout the lifespan. They are reshaping what and how we define knowledge, our valuing of knowledge and information, and in fact our daily lives. Information and communications technologies have transformed the nature of work and the structure of employment, have led to a growing range of adult education providers, and have permeated our living spaces and our leisure activities. They are reshaping the way we communicate with each other, the way we meet and exchange views, and hence our society.

Hayes (2001) notes the prevalence of information and communications technologies in the lives of adults who live in industrialized nations. These technologies “have also become an important resource for informal, self-directed learning, for example as adults use the web to search for information and to consult with others” (p. 215). In fact, our understanding and acceptance of conventional conceptions of literacy are being rendered obsolete. In the CMEC Report to UNESCO on Adult Education (1997) reference is made to the information superhighway.

*The information superhighway has challenged governmental and nongovernmental organizations to develop and protect full access to and democratic participation in the development of adult education... Technologies associated with the information highway present the opportunity for enhanced democratization with respect to adult education programming and delivery (p. 40).*

Based on our synthesis of the literature, we have decided against adopting one of the many available definitions of adult education. Most are exceedingly long and too inclusive to have meaning for our Canadian context. The recommended definition for the Council of Ministers of Education, in terms of Canada and its various frameworks for the provision of adult education, is exclusive of initial formal schooling at all levels, and inclusive of all those considered to be adult in various societal sectors across the nation. It is also inclusive of educational opportunities across formal, non-formal, and experiential spheres.

#### **Definition: Adult Education**

*Adult education refers to all sustained, systematic, and structured educational activities, at any level beyond initial education, whether offered formally or non-formally, which are undertaken by all of those defined as adults in their society for the purposes of personal, social, or workplace knowledge, skills, attitude, and values acquisition.*

### **CATEGORIES OF ADULT EDUCATION AND THEIR DEFINITIONS**

Adult education has various categories, which are incorporated within its boundaries. Whether formal, non-formal, or experiential, these categories of adult education are evidenced in the literature. All of these categories are recognized by adult educators as being, rightfully, a part of adult education. They each serve the knowledge, skills, and learning needs of the adult population, whether that need be for community action, for advancement in work, for improvement of one's self-esteem, or for basic literacy in a new country and language. As such, these categories should also be defined. Jarvis (1999) provided the basis for many of these definitions.

- ❖ **Adult Basic Education (ABE).** Education of adult populations in the areas of primary knowledge such as literacy, numeracy, and digital literacy, of social and life

skills, and of understanding of community life necessary to responsibly participate in society.

- ❖ **Adult Development.** The sequence of continuous growth and change through the various stages of adulthood, including physical, psychological, sociological, and intellectual growth and change.
- ❖ **Citizenship Education.** Education to make individuals aware of their rights and duties as citizens, often associated with immigration into a country, and can include second language education. Also designed to inculcate social behaviour and morals that are considered desirable in a particular community or society.
- ❖ **Community Development/Education.** A concept based in the idea that education should originate in and be designed to meet the interests and needs of the community and be directed toward improvement of quality of life - community development initiatives include social, recreational, cultural, and educational activities organized outside the formal education system and open to people of all ages within the community.
- ❖ **Continuing Education/Extension Education.** Referring to any learning activities that are entered into after the end of initial, full-time education, continuing education is commonly offered through university and college outreach programs. Extension education is often used interchangeably, since it too is part of university and college outreach programs for learners in the community.
- ❖ **Literacy Education.** Often used synonymously with ABE, however it is more narrowly conceived. Literacy education is aimed at providing basic reading, writing, digital, and numeracy skills to any members of the population in need of acquiring such skill development to a level of proficiency necessary to function on the job and in society.
- ❖ **Third Age Learning.** Learning and/or educational opportunities aimed at those citizens who are in the period of active life, after retirement.
- ❖ **Vocational Education.** Education that is oriented to work and employment, usually in skilled trades, and which is often initial preparation for work.
- ❖ **Workplace Training/Professional Development.** Refers to any educational or training activities taken for the purpose of developing or upgrading of skills to be used in a present or future career/employment position.

## SUMMARY

Terminology is a major issue in the adult education literature. In the national and international literature three terms seem to dominate: lifelong learning, adult learning, and adult education. However there is no consensus on the choice of one umbrella term to encompass all the nuances of the field, or on the integration of these terms. These three terms have been co-habiting in the field of adult education since the 1960s, and are likely to continue to do so.

Various definitions exist for all of the key terms, and various groups favour certain definitions. Lifelong learning encompasses both adult learning and adult education, but that does not imply that these terms are, or should be, subsumed within the one term of lifelong learning. In fact, adult education is the focus of much of the discussion in this section of the report, since it is the operational area for all three terms. It is what is done – what is provided - to encourage or enhance the learning in adult learning, and in part in lifelong learning.

Adult education can be viewed from two perspectives: how it is delivered and what is delivered. One simple way to categorize how it is delivered includes formally, non-formally, and informally or experientially. What is delivered can be categorized according to the various initiatives, or categories of adult basic education, adult development, citizenship education, community development/education, continuing education/extension education, literacy education, third age learning, vocational education, and workplace training/professional development.

In defining adult education for the purposes of this report and for the future use of the Council of Ministers of Education, Canada, existing definitions were examined and considered. However the definition created by the authors and ratified, with minor revisions, by the majority of stakeholders, is deemed to be clear and easy to make operational, in order to guide future thinking and policy development.

## EMERGING THEMES IN THE FIELD - TYPOLOGY

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A quarter of a century after Learning to Be, the International Commission on Education for the Twenty-first Century, chaired by Jacques Delors, declared:

*The concept of learning throughout life is the key that gives access to the twenty-first century. It goes beyond the traditional distinctions between initial and continuing education. It links up with another concept, that of the learning society, in which everything affords an opportunity for learning and fulfilling one's potential.*

As indicated in the Hamburg Declaration,

*adult learning has grown in depth and scale, and has become an imperative at the workplace, in the home, and in the community, as men and women struggle to create new realities at every stage of life. Adult education plays an essential and distinct role in equipping women and men to respond productively to the constantly changing world and to provide learning which acknowledges the rights and responsibilities of the adult and the community. (Kuper & Valiente-Catter, 2001, p. 405)*

### INTRODUCTION

As we explored the literature of the past few years on adult education, certain patterns began to appear. In keeping with semantic content analysis and synthesis, we categorized the literature in relation to the emerging themes. These themes provide insight into the thinking of adult educators and adult education researchers at the beginning of this new century. There is one overarching theme, which can incorporate the other themes within its span. Themes identified include:

Major Conceptual Theme: The Learning Society

Contributing Themes:

- ❖ Living and Working in the Knowledge Age
- ❖ The Civil Society
- ❖ Culture, Media, and Information and Communications Technologies
- ❖ Living Longer and Learning Wider

### THE LEARNING SOCIETY

Hutchins (1970) argued that a 'learning society' had become a necessity. He noted that educational systems were no longer able to respond to the demands made upon them. Instead it was necessary to look toward the idea that learning was at the heart of change. He stated that 'increasing proportion of free time and the rapidity of change...requires continuous education.' He looked to ancient Athens for a model. There 'education was not a segregated activity, conducted for certain hours, in certain places, at a certain time of life. It was the aim of the society. The city educated the man. Hutchins noted that the Athenian was educated by culture, or by "paideia".

What is the learning society? There is no single vision of the learning society. According to Hutchins (1970), the learning society is founded in classical humanism. Other writers (Boshier, 2003; Hughes & Tight, 1998) argue for an integrated model of education for life, based in radical, democratic thought. The learning society is also based in current trends in communications technologies, and the likely consequences of these for knowledge, information, and production (Griffin & Brownhill, 2001). The learning society can also be an economic conception ... in which individual learning and development are welcomed, but for their contribution to the growth and development of economic capital (Hyland, 2000). In fact, Sumner (2000) notes:

*The rise of corporate globalization has thrust the issue of community sustainability to the forefront of public discussion... the concept of sustainability is often understood in terms of economic growth. However, economic growth as expressed through corporate globalization is grounded in a set of values that does not select for decisions of civil or environmental sustainability. (p. 448)*

A learning society acknowledges that knowledge, skills, and competencies are equivalently recognized regardless of where and how they are acquired. In one vision "the main objective is individual development and improved quality of life; in another it is the promotion of social equality and social cohesion; most commonly, perhaps, it is enhanced productivity and national economic competitiveness" (Green, 2000, p. 35). Great Britain adopted as policy the notion of a learning society, vowing to have become one by the year 2000. However that nation's Conservative government defined their vision of learning society in alignment with the economic imperative:

*A learning society is one that systematically increases the skills and knowledge of all its members to exploit technological innovation and so gains a competitive edge for their services in fast-changing global markets. This requires a workforce that is computerate rather than merely functionally literate and numerate. (Ainley, 2004, p. 1).*

Ainley (2004) takes exception to the narrow focus of economic imperative, and decries the lack of cultural imperative in the current approach. He notes that the first priority for any government truly committed to a real learning society:

*...would be to re-establish the central purpose of education, science, and the arts in society: to stimulate thought and develop new knowledge and skills to deal with rapidly changing reality. This would be a real cultural revolution – not the partial skills revolution ... limited only to vocational preparation and individual competition (p. 3).*

Many adult educators call for the broader of vision of a learning society. They reject the single emphasis on employment skills and the needs of industry, noting that utilitarian skills and knowledge must be incorporated in a wider framework of human culture and societal development. In their view "only information combined with democracy can provide the knowledge and skills necessary to thrive in a real learning society" (Ainley, 2004, p. 3).

Edwards (1997) also supports this broader vision, while recognizing the current dominance of the economic imperative. He mapped the territory of the learning society, identifying three pathways. "The first is portrayed as a product of modernism. The second emphasizes the economic imperatives, the market, and individual achievement. The third is post-modern. In our current decade, it is the second of these pathways that dominates – that of economic

imperative, globalization, and learning for work in the knowledge age. His ideas are further illustrated in Figure 3.

**Figure 3. Typology of the Learning Society (extracted from Edwards, 1997, p. 175–184)**

Edwards' Typology	Descriptor
The Learning Society as an Educated Society	Reflected in a commitment to active citizenship, liberal democracy, and equal opportunities. This conception supports lifelong learning within the social policy frameworks of Post-second World War social democracies. The aim is to provide learning opportunities to educate adults to meet the challenges of change and citizenship. Support for this conception lies with liberal educators in industrialized societies, as part of modernist discourse.
The Learning Society as a Learning Market	Reflected in the enabling of institutions to provide services for individuals as a condition for supporting the competitiveness of the economy. This supports lifelong learning within an economic policy framework adopted by many governments since the 1970s. The aim is for a market in learning opportunities to be developed to meet the demands of individuals and employers for the updating of skills and competencies. Support for this conception has come from employers' groups and policy think tanks in industrialized societies in response to economic uncertainty.
The Learning Society as a Learning Approach to Life	Reflected in learners' adoption of a learning approach to life, drawing on a wide range of resources to enable them to support lifestyle practices. This supports lifelong learning as a condition of individuals in the contemporary period to which policy needs to respond. This conception views the latter as a series of overlapping learning networks, and is aligned with the post-modern, with its emphasis on the contingent and on participation in learning as an activity in and through which individuals and groups pursue their heterogeneous goals.

The learning society can be viewed as locating learning as a quality not just of individuals, but also as an element of systems through a societal orientation to learning. Young (1998) notes:

*The strength of the idea of a learning society as a concept is that in linking learning explicitly to the idea of a future society, it provides the basis for a critique of the minimal learning demands of much work and other activities in our present society (p. 193).*

### **Living and Working in the Knowledge Age**

The most highly advocated attribute of the new capitalism is arguably the notion of lifelong learning. The conception of learning as a continuous lifelong process is not evident in any of the lower-level [workers'] conceptions of learning. In this conception workers described the need to constantly search for new information as the processes and technology they use, and services they provide, keep changing. It is assumed that through this search for knowledge they may recognize a need to change their fundamental perspective of life and thinking from

that of an industrial era to that of a knowledge-driven workplace. (Pillay, Boulton-Lewis, Wilss & Rhodes, 2003)

As stated in CEDEFOP (2004) “Living and working in 21<sup>st</sup> century Europe is about living and working in the Knowledge Age” (p. 7). Changes in society – in particular in the area of work, careers and business – have implications for what it is that people need to know, and to be able to do. It prompts a redefinition of basic education and literacy, and adds to the old repertoire of basic skills new basic skills such as digital literacy. According to the CEDEFOP (2004) report, lifelong learning, from the European perspective, is inextricably linked to economic sustainability. Issues raised by contributors include: focus on the type of education and training required by knowledge economies, rates of return on investment in education and training and how they can be assessed, and public policy in relation to implementing lifelong learning.

CEDEFOP (2004) describes the contents of the European Council's and the European Commission's joint report on progress toward the Lisbon goals. The interim report contains four key messages that are heavily weighted toward the economic paradigm:

- ❖ Investment in human resources through education and training is essential for Europe's future economic prosperity and social cohesion.
- ❖ Immediate action is called for in three crucial areas: securing greater and more effective public and private investment in education and training.
- ❖ Higher levels of participation of lifelong learning – more specifically in adult learning – must be achieved.
- ❖ Education and training systems reforms must take hold more rapidly.

Murphy (2000) uses the older concept of post-industrialization in relation to the current concept of globalization as signifying societal change. He sees similarities in that both concepts signify a change in the social order, and they originate in a worldview of economic sustainability.

Stronach and MacLure (1997) claim that there is an increased unruliness to knowledge; that there is a sense of fluidity to knowledge, itself signified in the calls for lifelong learning as a part of the processes of adaptation to change. Positivism has been rejected in many areas of the social sciences, and the rules of natural science no longer bind. Jarvis (2001) notes that the post-modern framework of knowledge as situated, contextual, and unstable, which is held by adult education researchers in this century, is indicative of a rejection of the positivist perspective of knowledge as stable and unchanging.

Edwards (2001) echoes these authors, referring to the concept of knowledge fluidity as “changing knowledges”. He outlines three senses of changing knowledges:

- ❖ Knowledges change over time, they diversify and are contested.
- ❖ The development of different knowledges effect change for the people concerned and their communities.
- ❖ There is knowledges of change – how people understand these processes affect the way they engage with them. (p. 90)

Frost and Taylor (2001) relate living in the knowledge age to work-related learning, which has, in the past two decades of increasing globalization and a market economy, become central to much adult education and lifelong learning policy and practice. They note that the developed world has moved into the knowledge age, which is characterized by “an

increasingly sophisticated, diverse, changing, flexible, and atomized economic structure, where knowledge and information of all kinds become central economic goods” (p. 50).

Jackson & Jordan (2000) echo this view noting:

*After a century of second class status, the idea of ‘learning for work’ has become the darling of public policy. In the past decade, governments across the industrialized world have made sweeping promises constructing vocational education and skills training as the means to prosperity in the global economy of the twenty-first century. (p. 196)*

This stance, on the part of governments, is predicated on the premise that economic growth and stability in business translates into well-being for communities and for individuals. In our era of globalization and knowledge economy, these assumptions have been accepted without much question in the name of competitiveness, productivity, and economic survival. The workplace is driving efforts in adult learning and adult education.

Livingstone (2004) provides information on the Canadian scene, based on the National Survey on the Changing Nature of Work and Lifelong Learning (WALL). Of the 9,000 plus respondents, nearly half indicated their organizations:

*...have reduced their number of employees, over 40% have increased their reliance on part-time or temporary workers, a similar proportion have increased job rotation and multi-skilling of remaining jobs, over one third have increased overtime hours and over one quarter have reduced their numbers of managerial personnel. Over two-thirds have indicated that the work techniques and equipment regularly used in their jobs has changed at least moderately in the past five years.... The findings suggest a substantial amount of organizational restructuring, job churning, work intensification, and increased credential entry requirements in the Canadian labour force in recent years, along with incremental increases in employee performance skills and responsibilities. (p. 339-340)*

Living in the knowledge age, as we currently are on a global scale, requires a typology of perpetual learning, according to those adult educators who accept the linkage of the knowledge age with the forces of globalization and the economic imperative. Norris (2001) presents an integration of perpetual learning into the present learning typology as follows.

**Figure 4: Norris’ Typology of Post-Secondary Learning for Adults**

Categories of Learning and Education	Descriptors
Traditional Education	Includes all formal degree programs with a focal point of traditional education institutions such as universities and colleges, where learning experiences are taught by faculty. In the knowledge age new competitors include virtual universities and publishers, e-learning and cohort-based learning programs.
Specialist Programs	Includes instrumental skills programs of many varieties linked directly to job market specialization, with a focal point of continuing education/extension divisions where learning experiences are taught by practitioner/educators. In the knowledge age new competitors include high demand corporate sponsored and collaborative partnership programs and e-learning.



Categories of Learning and Education	Descriptors
Tradecraft Advanced Learning	Includes tutorials and certification programs offered through professional societies; these are immersive and interactive in approach to learning experiences, with a focal point of associations and professional societies. In the knowledge age these are often collaborative efforts in partnership with colleges and universities, with competitors including niche associations and e-learning.
Organization-centric Learning	Includes the building of learning organizations through development of individual, corporate/organizational, and team skills, with a focal point of all kinds of for profit and non-profit organizations. In the knowledge age new competitors include collaborative partnering, organization-specific learning, and e-learning.
Personal Development Learning	Includes learning oriented toward personal growth and development and not related to certification or professional development, with focal points of community based learning and continuing leisure education. In the knowledge age competitors include e-learning, with access to information from home and/or elsewhere – i.e. any time, any place.

There are many voices in the literature that question the inextricable linkage of the knowledge age, globalization, and the economic imperative. These voices point to the reality of work and employment in many industrialized societies. For example, Cruikshank (2002) notes that many Canadians are under-employed in terms of their education and skill levels. She cites Stanford (2001): “For every nerdy computer technician in Canada, there are 15 retail clerks. There are 12 restaurant workers for every financial professional. There are six truck drivers for every specialist in pharmaceuticals and biotechnology” (p. 31). Are these workers identifiable as contributing members of the knowledge age, in terms of their employment?

Whether the narrow focus of the knowledge age in relation to the economic imperative is universally accepted, it is reflective of the way industrialized nations and communities view living and working in today’s knowledge world. As the OECD Report (2001) indicates, the economic and societal forces have increased economic inequality and job security, and have caused major sectoral reallocations of labour, driving the impetus to lifelong learning in OECD countries. Lifelong learning is seen as a way to offset the effects of the interrelated forces of technological development, globalization, and the explosion of knowledge, preparing the populace for the new labour market.

### **The Civil Society**

A critical practice of adult education and lifelong learning places issues of democracy, equity, justice, and citizenship at the heart of learning for life and for work. It promotes contextualized learning in the intersection of the ethical and the political, bringing history to bear on economics and culture...and inclusive holistic critical practice embeds learning for work within a broader learning paradigm that includes social and cultural learning. (Grace, 2004)

The linking of active citizenship and adult education is a common theme in the literature. Historically, popular social movements have been providers of and demanders of adult education throughout the past century. However, as noted by Field (2003), that classical era of adult education for citizenship has been in decline as the market-driven, economic model has gained prominence. Researchers have continued to examine the ways in which adult

education intersects with civic engagement in contemporary society, and “the concept of social capital has brought a new vigour to this well-established debate... offering a potential counter-balance to...the overbalance on human capital in the dominant literature’ (Field, 2003, p. 142).

Social capital as a concept refers to the resources people derive and make use of through their interactions and relationships with others. Social capital is built through civil engagement and active citizenship. Figure 5 offers some speculative assessment of the potential of three forms of social capital on lifelong learning (Field, 2003, p. 147).

**Figure 5: Bonding, Bridging, and Linking Social Capital and their Possible Effects on Lifelong Learning**

Type of Social Capital	Possible Effects on Lifelong Learning
<p style="text-align: center;"><b>Bonding</b></p> <p>Dense but bounded networks, homogeneity of membership, high levels of reciprocity and trust, exclusion of outsiders.</p>	<p>Free exchange of ideas, information, and skills within the group; strong influence on identity formation among children; high trust placed in information received; limited access to new and varied knowledge from outside group and low trust in knowledge from outside group; relationship to education system likely to be highly traditionalist in orientation.</p>
<p style="text-align: center;"><b>Bridging</b></p> <p>Loose and open-ended networks, heterogeneity of membership, shared norms and common goals; levels of trust and reciprocity may be somewhat limited.</p>	<p>Relatively free exchange of a variety of ideas, information, skills, and knowledge within the group and between own and other groups; potential resources for identity maintenance and renewal among adults; high trust in knowledge and information from within group (and possibly from others with shared values); relationship to formal education system highly context-dependent.</p>
<p style="text-align: center;"><b>Linking</b></p> <p>Loose and open-ended networks, varied membership, shared norms and common goals, levels of trust and reciprocity may be circumscribed by competing demands.</p>	<p>Relatively free exchange of a variety of ideas, information, skills, and knowledge within the group and between own and other groups; some trust in information and knowledge from within group (and possibly from others with shared values); open resources for identity change among adults; relationship with formal education system highly conditional.</p>

Martin (2003) sees lifelong learning as a political rather than an educational discourse. “Democratic citizenship, properly understood, depends on determined progress toward a more equitable distribution of material and cultural resources among citizens” (p. 566). He notes that education alone cannot make the necessary structural changes and change in focus to accomplish this. But critical adult education, as opposed to the economist model currently prevalent within the aegis of lifelong learning, can and should raise the issue of what is meant by active citizenship in a democratic society. Fragoso & Lucio-Villegas (2000) concur, noting that adult education should be seen as political and cultural in intent – from a critical perspective, “because it is only by knowing deeply the system that one gains the possibility to change it” (p. 123).

Boxler (2002) notes, “critical is seen everywhere – in article titles, papers, books, dissertation abstracts, course syllabi, and so on to the point that critical becomes axiomatic” (p. 43). If the notion of critical adult education is to have meaning, it must challenge and contest the seeming political settlement between democracy and the market system promulgated through lifelong learning – the “abandonment of education as social *policy* in favour of individual learning as government strategy” (Griffin, 1999, p. 432).

Brookfield (2002) states: “Critical theory of adult learning drawing on the Frankfurt school tends to stress the importance of social learning and to denigrate as a humanistic diversion any extended focus on individual learners” (p. 55). Adult education embraces the goal of bringing about learning, whether for the benefit of the individual or of society, or even of the workplace. These three benefiting sectors need not be competitive – indeed what is good for society may be also beneficial to the individual and the workplace. However, no one of these sectors should be ignored in favour of the others.

There is a call for the renewal of the civil society framework in adult education and lifelong learning, as an alternative means of representation and action. “Civil society stands apart from government and economic organizations within the marketplace. It includes grassroots organizations which may mobilize for social change such as environmental groups, peace activists, anti-poverty coalitions, and feminist organizations” (Gouthro, 2002, p. 194).

Institutions of the civil society are obliged to aid us in becoming competent, active citizens of our particular world. “This is an essential aspect of adult learning for active citizenship, a means through which education can foster democratic forms of social learning” (Gouthro, 2002, p. 194).

Aggarwal, Fallis, and Luker (2000) suggest the need to start over in adult education. “Adult educators need to re-examine the present practice of adult education and community development in Canada, as compared to our earlier ideals... that included the promotion of greater democracy, social equality, and equitable economic opportunities for all Canadians” (p. 530).

They point to the role of community agencies in delivering non-formal adult education programs for basic living and integration into the community, but also programs that focus on “social change, greater democracy, social equality, and equitable economic opportunities for all Canadians” (p. 530). There is great potential for emancipatory adult education here – adult education which involves a movement for social justice.

However, that potential for adult education in terms of the democratic ideal and the civil society is threatened by the very structures of our society. Those same community agencies which move adult education away from the economic imperative and toward the democratic ideal of social learning and social capital must rely on government and institutional structures for funding.

*The structure of funding and the fear of loss of funding are the main modes by which community development and adult education projects in community agencies are disciplined toward a practice of compliant pragmatism. Funding tends to be short-term and unstable in the sense that renewal is not counted on even in the case of project success. Continuity and community confidence are often impossible to sustain under such circumstances. (Aggarwal et al, 2000, p. 531)*

Too little attention has been awarded to the significance of adult learning for citizenship, health, and environmental concerns. Explorations of experiences gained in empowering the most vulnerable members of society continue to be exceptions. Almost everywhere there are genuine indications of a benevolent political will, but what is needed now is concrete action and accountability. (UIE, 2004)

*If culture as knowledge and culture as community were synchronous entities impacting lifelong learning as a concept and a practice, then a dynamic equilibrium between learning for the marketplace and learning for life might be possible. Concerns such as those expressed at CONFINTEA V and the mid-term review of conference goals (2003) remain aligned with adult education's focus on community and the political ideals of modernity, democracy, freedom, and social justice for all. (Grace, 2004, p. 403)*

### **Culture, Media, and Information and Communications Technologies**

Not only is there diversity of media and communications technologies for learning, and broader access to learning through ICTs, but there is developing, also, a diversity of understanding about learning itself (Heaton-Shrestha, Kelly & Edirisingha, 2004).

Information and communications technologies (ICTs) can provide the means for adults to participate in educational and learning endeavours by increasing access to those previously unable to avail of adult education programs and opportunities. However, access is just one impact of ICTs, and maybe not the major impact. ICTs should be viewed from a much broader perspective than that of delivery systems for adult education. ICTs are societal and cultural phenomena that shape the way we communicate and interact with the world around us, and that change us as we integrate them into our lives.

Wilson (2003) notes a number of influences of ICTs, including:

- ❖ Influence on the nature of work, which has changed radically in industrialized nations through the incorporation of ICTs.
- ❖ Influence on adult learning in terms of what to learn, with basic skill incorporating digital literacy and technology skills.
- ❖ Influence on how to learn, with access to the web and self-directed learning made easy from any time, any place.
- ❖ Influence on social relations, with the possibility of facile, instant, and group communications around the globe and the formation of virtual communities, or the culture of ICTs.
- ❖ Influence on culture by encouraging cultural diversity and providing a forum for creative output and production, or ICTs and the creative imperative.

In fact, ICTs have expanded our 21<sup>st</sup> century industrialized world to practically limitless horizons. The pervasiveness of ICTs in our lives has reshaped our ways of learning and living. We have the possibility of becoming instant experts on topics of interest to us through our own individual research efforts. We communicate broadly and are exposed to ideas and cultures beyond our own physically limiting world. We access formal and non-formal educational opportunities from institutions and sources around the globe. We live daily wired to the world at large. Our media are no longer individual, but integrated through digital technology into new forms and new ways of access. The cultural impact is tremendous, with dominant imported cultures influencing the politics and the lives of distant nations through

ease of access. The rise of English as an essential language globally is due in no small part to the dominance of that language on the Internet (CONFINTEA Midterm Review, 2003).

It is, perhaps, for this reason that UNESCO sponsored a project entitled ICTs for Intercultural Dialogue: A UNESCO Project for Indigenous People. The project report estimates that Indigenous people number 350,000,000 living in 70 countries, and communicating in over 5,000 languages. UNESCO's Universal Declaration on Cultural Diversity emphasizes the need to preserve the cultural resources of indigenous people by fostering access to ICTs and narrowing the digital divide, through promotion of local cultural expression and preparation of cultural content for the media. (UNESCO, 2004)

Sawchuk (2003) recognizes the critical tool mediation of ICTs in capitalist development. But they reach beyond the world of work. In industrialized countries ICTs "are both economic and cultural phenomena. ICTs "suture together peoples practices across different spheres of their lives" (p. 10). In relation to a learning culture, ICTs have accelerated the individualization of learning through ease of access and interaction with other learners without having to attend designated learning centres or institutions. "They have also blurred the line between knowledge and information, and in fact broken down the hierarchical position of knowledge – what constitutes knowledge and worthwhile knowledge is further radicalized as an issue" (Edwards & Usher, 2000, p. 98).

Murphy (2000) argues that new technologies reach far beyond their readily recognized implications for work, employment opportunities, and the provision of education and training. He sees technology as pervasive and reaching beyond the political and economic forums in which they are usually debated. These technologies have transformed all aspects of human living. If we explore the lives of young people, we find that ICTs have shaped their thinking and their ways of knowing. A new generation of adults is emerging from the past two decades of ICT developments – a generation of adults which operates in a different society, with different expectations of work, and different values regarding what constitutes valuable knowledge. Puigvert, Sorde & Soler (2000) note:

*The information age provokes new marginalization and exclusion at the global level, but the rise of a network society opens new possibilities for dialogue between people and for social transformation...this society is increasingly structured around the bipolar opposition between the Net and the Self because, with ICTs individuals can contact each other and construct alternative projects outside the control and mediation of institutions. Thus, social networks are rising and overcoming social institutions. (p. 357-358)*

Norris (2001) states: "It is ironic that technology's greatest contribution will be the enhancing of relationships... Yes, the most transformative element of ICTs is the 'C'. Pervasive interactivity is changing the way we live our lives" (n. p.).

### **Living Longer and Learning Wider**

Education for its own sake, or education in the liberal tradition, were dominant ideas informing education policy and educational thinking in the 1960s. Forty years later, Bowman & Burden (2002) conducted a research study that noted what came through very strongly in their interviews was a sense of the intrinsic enjoyment in learning for its own sake. This was seen as contributing to a sense of active creativity and of self-esteem. For many of the respondents education seemed to be an alternative to the world of work, all the more attractive because of its separation from it, rather than an instrumental means of finding a way to improve their work skills and employment prospects. (Bowman & Burden, 2002)

The life cycle model, introduced in the psychology of the 1970s, provides the foundation for the concept of continued development and learning through adulthood and into older age. The life cycle model claims that educational processes are intrinsic to living, and perhaps even a central defining feature of living – “people are unfinished realities whose construction and development is an ongoing life goal” (Osorio, 2003, p. 87). Added to the life cycle model, in terms of influencing the inclusion of older adults in education, is the extended life span of individuals living in the late twentieth and into the twenty-first centuries. Adults now commonly live for fifteen to twenty years beyond retirement age. Not only do they live longer - because of medical advances and healthier lifestyles, they often live healthier. Glendenning (2000) notes “...the growing awareness demographically of the vastly increased numbers of people over 50 or 60, who were about to face one-third of their lives in ‘retirement’, having ceased their full-time work” (p. 13).

In 1997, the National Institute of Adult Continuing Education (NIACE) conducted a survey of over 4,000 participants deemed to be adult. Results indicated that nine percent of those aged 55-64, and equally nine percent of those over age 65 were studying, or had studied, in the past three years (Glendenning, 2000). In the white paper ‘Learning to Succeed’, it is claimed that older adults benefit greatly from continued learning, and that research has demonstrated older people who remain active learners enjoy healthier lifestyles and maintain their independence longer than those who stop active pursuit of learning (Withnall, 2000).

Osorio (2003) notes “The traditional scheme, education-work-retirement, no longer holds meaning in modern society, since it is no longer a simple linear progression” (p. 88). In developed countries, the period of initial education is extended through participation in tertiary education, and the period of life devoted to work is both shrinking and unstable – through early retirement options and through corporate layoffs and buy-outs. At the same time, retirement is not only occurring earlier but is also extended through increased life expectancy. Hence the growing interest, on the part of adult educators, in third-age learning and education.

The focus in third age education encompasses both formal and informal education, with the primary aim of providing stimulating learning experiences and specific programs for third age learners. It is recognized that third age learners often provide valuable community and social contributions through their volunteer efforts post-retirement (Osorio, 2003). Universities of the Third Age, originally created in France in the 1970s, have a specific purpose of bringing into practice institutional actions that favour older age learners. These international universities, and related centres of education for older adults, now span five continents and offer educational experiences related to health, personal development, leisure activities, cultural development, and intellectual development for adults in or approaching retirement. According to International Notes (2002), motivations for involvement on the part of third age learners include:

- ❖ To overcome the limitations of older age;
- ❖ To increase personal mental and physical autonomy;
- ❖ To experience new opportunities for socialization and enjoyment;
- ❖ To acquire higher levels of cultural and scientific knowledge. (p. 108)

In addition to increased lifespan and longer, healthier retirement years, the impetus toward lifelong learning needs to be more than inclusive of older adults. Third age learners need to become a targeted group in the lifelong learning agenda of various nations. In association with the growing recognition of extending education into retirement years, there is the recognition that education, throughout the life span, can serve many different purposes and

consist of many different experiences. There is an admission that learning is not necessarily hierarchical and cumulative, nor should it be. Learning as a lived experience spans not only our entire lifetimes, but also all facets of our lives – that is, lifewide learning.

Lifewide learning refers to learning by individuals at all phases of their growth and development in which all aspects of the learning are integrated and interwoven across the various spheres of living. Lifewide learning implies a shift in responsibility for education and learning from the public to the private and civil spheres – a diversity of learning environments through which people develop and learn. It is a recognition that learning can occur through all human activity. Glastra, Hake & Schedler (2004) refer to lifelong learning in the 21<sup>st</sup> century as transitioning into lifewide learning – an integrated and seamless state of living and learning.

Alheit & Dausien (2002) note that there is a new understanding of the term ‘learning’ – “the option of networking these different forms of learning [formal, non-formal, and experiential] in a synergistic way – learning should not only be systematically extended to cover the entire *life span*, but should also take place *lifewide*” (p. 4). They suggest that learning environments should be envisioned in which the various types and purposes of learning complement each other, and in fact become one.

## **SUMMARY**

Through semantic content analysis of the literature, it was possible to identify emerging themes. We see the overarching theme in the literature, supported by the notion of lifelong learning in the industrialized world, as the learning society. The learning society is one that acknowledges the need for and the value of learning throughout life, and for all purposes in life. The learning society incorporates a number of themes, including learning for work, economic sustainability, and the growth of human capital in this age of globalization and the knowledge economy. It also incorporates the development of knowledgeable citizens and the goal of learning for the creation of the civil society. It acknowledges our changed world of ICTs, and the ways they impact on how we learn, what we learn, and what we value as knowledge, information and culture. And lastly, the learning society incorporates a vision of learning throughout the life span and learning that is integrated across all facets of living, broadening the concept of lifelong learning to lifewide learning.

## A TYPOLOGY OF ADULT EDUCATION FOR 21ST CENTURY CANADA

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The term typology is defined simply by Jarvis (1999) as "a specific classificatory scheme" (p. 189). Why classify adult education? A typology clarifies by identifying, and also by explaining linkages or relationships between various concepts or elements that comprise a complex entity. Given the breadth and scope of the field of adult education, a typology offers promise in determining the various entities within the field, and in providing clarity in terms of direction for future policy development. "Typologies are seen as useful in theory-building and in improving professional practice. Typologies provide a way to group [entities] according to a variety of characteristics, thus incorporating diverse information into a meaningful conceptual framework" (HRSDC, 2001).

A typology of adult education can be either very complex or rather simple – in order for the typology to have utilitarian worth it is best to err on the side of simplicity. Of the various typologies in existence in the literature for certain concepts related to adult education, there was no current and comprehensive typology of adult education. Therefore based on the review of literature described earlier, the research team developed a typology of adult education that was deemed suited to the needs of 21<sup>st</sup> Century Canada. Through perusal of a large body of literature and the emergence of themes from that literature, it seems fitting that our typology should reflect those themes. The overall theme of the Learning Society is the foundation of our typology. The Learning Society is what is possible for Canada, given an adult education policy and direction which embraces the idea that learning lies at the heart of change, where it is integral to all aspects of living in our new century.

The themes identified in and synthesized from the literature in our earlier chapters are used as the organizing framework for the following typology of adult education – a typology built on the foundation of the Learning Society. This typology is not meant to be hierarchical; it presents all categories of adult education as equally meritorious, and as equally important to humanity in terms of quality of living, quality of working, and quality of community and society, now and in the future.

Figure 6 describes a proposed typology to be used to guide the development of a Pan-Canadian policy framework.



**Figure 6. An Adult Education Typology for the Learning Society in the 21<sup>st</sup> Century**

<b>The Learning Society</b>	<b>Indicators</b>	<b>Description</b>
Adult Education in the Knowledge Age	Globalization, Knowledge Economy, Workplace Learning, Human Capital, Economic Imperative	The thrust of adult education is to ensure that adults are able to work and compete in the global economy, through the development of skills and knowledge that are of value to organizations and the marketplace. The goal is economic sustainability through perpetual learning.
Adult Education for the Civil Society	Active Citizenship, Critical Practice, Equity, Social Capital, Civil Imperative	The thrust of adult education is to ensure that adults live in and contribute to a world of enlightened and active citizenship and democracy. The value of learning is in relation to social capital – the resources forged through relationships and interactions with others.
Adult Education and Culture, Media, and ICTs	Access, Changing Nature of Work, Cultural Preservation, Communication, Network Society, Technology Imperative	The thrust of adult education is to ensure that citizens have access through ICTs, but further, to recognize that learning and knowledge are being redefined in relation to ICTs. Through ICTs, cultural diversity can be promoted, and the integration of learning across the various spheres of life can be accomplished.
Adult Education and Living Longer and Learning Wider	Third Age Learning, Societal Demographics, Integrating Learning and Life, Learning Imperative	The thrust of adult education is integration of the various purposes for learning and knowledge accumulated through learning throughout one's life, so that learning is valued for many purposes and used in many spheres and life stages. The overarching ideal is learning for living.

**SUMMARY**

The literature on adult education is vast – even given our major concentration on the most recent literature. In the past five years a multitude of topics have been addressed, including various learning theories, lifelong learning, new literacy, post-modern frameworks, feminist theory, third age education, and the incorporation of human resources development within adult education. Controversies are reflected in the literature, too. The major controversy, which is still emerging, revolves around the perceived dominance of the economic imperative on the part of government and policy frameworks in industrialized nations. Adult education being narrowly conceived as a vehicle for increased productivity and human capital development in a global and knowledge age – the economic imperative – is questioned by a significant number of adult educators and researchers.

A re-emphasis and rediscovery of the original critical history of adult education is evidenced in the literature. There is a call for education within a social capital framework, based on the recognition that educated citizens make better citizens, hence better societies. Along with

the recognition of education for living, as opposed to education for working, is the realization that adult education is operating today in a changed and ever-changing world. ICTs infiltrate all aspects of life in industrialized nations, and they change the way we communicate, with whom, and how we access information and knowledge – in fact they have changed our conceptualization of what constitutes knowledge.

Given societal demographics on workplace restructuring, early forced or voluntary retirement, and increased lifespan, adult education is expanding to include older adults – third age learners. This too moves the field away from a narrow thrust of human capital development, and contributes to the growing visualization of learning as lifewide, occurring not just throughout the lifespan but becoming integrated across all facets of living. What is envisioned, though named variously in the literature, is the Learning Society; a re-establishment of the central purpose of adult education, which is to stimulate thought and develop knowledge and skills for living in an ever-changing world. The typology we present reflects the themes in the current literature by emphasizing the equal importance of adult education for work, for living as members of society, for living in our ICT world, and for living longer and wider lives.

## PROMISING PRACTICES IN ADULT EDUCATION

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### OVERVIEW

Increasingly, today's world is characterized by globalisation, the knowledge economy and rapid advancement in information and communication technologies (Nyhan, 2002). One element of a policy strategy that has emerged to enable citizens to meet these new challenges is lifelong learning. As evidenced in the strategic goals of governments (Government of Canada, 2002), educational institutions (Royal Roads, 2005), private companies (Telus, 2003), and not-for-profit organizations (Developmental Gateway, 2005), people have become the new asset, and knowledge the new commodity.

However, "the scope of change in the global knowledge economy is such that governments can no longer depend solely on the formal school system for the supply of human capital that is needed by the nation" (Tuijnman, 2003, p. 472). As a result, there is a need to improve the knowledge, skills and competencies of our citizens as part of a lifelong learning strategy that embraces the concepts and principles of a "Learning Society" so that we are better able to participate in the new economic environments that embrace a democratic society and enhance our culture. "In this sense, 'lifelong learning' is no mere slogan or empty rhetoric because it defines human life itself in twenty-first century societies" (Tuijnman, 2003, p. 472).

Lifelong learning as a strategy offers the promise of a flexible, efficient way to develop the foundational skills and required human, social and cultural capital to participate in the new economy (Tuijnman, 2003). For it to do so however requires a rethinking of traditional formal educational structures, an explicit recognition, value and support of informal and experimental educational opportunities and the development of appropriate quality and assessment measures (Baran et al, 2000; European Commission, 2001; Lowe, 2001). It also requires an increased participation by disadvantaged groups and those with low-level skills in learning opportunities and a rethinking of the quality of programs and the evaluation tools that are used to assess effectiveness (Baran et. al, 2000; Watson, 2001). The European Commission has identified eight building blocks required for implementing a lifelong learning strategy (European Commission, 2002). The common thread connecting these building blocks is the professional field, practice and policies of adult education.

As governments shift from skill-based to knowledge-based economies that are supported by a strategy of lifelong learning, adult education and its associated policies are viewed by many as being tools to achieving the goal of a knowledge or learning society (Canadian Delegation, 2004; Government of Canada, 2002). Adult education has been linked to a wide array of national and regional benefits including increases in (1) productivity, (2) individual opportunity for employment, (3) base skill level across populations, and (4) innovation (OECD, 2004).

However, as evidenced in the previous chapter, adult education itself is a complex policy arena. Since the International conference on adult education (CONFINTEA V) and the Hyderabad statement on lifelong learning (Hyderabad, 2002), several countries have been attempting to foster lifelong learning through adult education policy and program development (OECD, 2004). One of the key aspects involved in developing a comprehensive policy for adult education is the review, consolidation and consideration of best practices. This chapter focuses on the promising practices of adult education that have emerged in the literature over the past five years.

## DEFINING BEST PRACTICE

*During the agricultural age, land tenure emerged as the dominant form of wealth. In the industrial age, financial capital moved the world. Now, in the knowledge age, corporations are focused on “intellectual capital”, which includes lessons learned and best practices. (Patton, 2001, p. 329)*

In order to discuss the examples provided in this section, it is necessary to first establish what is meant by the terms best practice, good practice and promising practice. These terms are widely used in the literature of lifelong learning, adult education and adult learning but with varying definitions and associated characteristics. Patton (2001) suggests that it is the wide spread use of the term best practices that is contributing to its lack of meaning and value.

The lack of a common definition and standard for best practices and the variety of assumptions that are associated with best practices tends to make them suspect. The key to their validity lies in making explicit the context of the best practice and fostering the understanding that what may be a best practice in one setting does not necessarily translate to another setting. Patton (2001) argues that substitute phrases such as “better practices” or “effective practices” make room for the role of context in the description and tend less toward overgeneralization. The critical aspect of “better”, “good” or “promising” practices are that they are used in a way that **guides practice instead of prescribes practice**.

For the purposes of this chapter, the term promising practices will be used to highlight adult education programs and initiatives that have been effective in their own setting.

## EXAMPLES OF PROMISING PRACTICES

The European Commission has identified eight building blocks required for implementing a lifelong learning strategy grounded in adult education policies and programs (European Commission, 2001, p. 11 - 25). These building blocks include:

- ❖ **Develop Partnerships**– All relevant actors, in and outside the formal systems, must collaborate for strategies to work “on the ground”.
- ❖ **Recognize the Needs of the Learner** – Insight is required on the needs of the learner and potential learner along with the needs of organizations, communities, wider society and the labour market.
- ❖ **Provide Adequate Resources** – Ensure transparency of resources as well as adequate supply of resources through financing.
- ❖ **Match Learning Opportunities to Learner Needs** – Ensure flexibility and array of program offerings are available and accessible to meet individual learner needs.
- ❖ **Facilitate Access** – Develop the supply side to enable learning by anyone, anywhere at any time.
- ❖ **Create Value** – Value all types of learning equally: formal, in-formal, non-formal.
- ❖ **Create a Learning Culture** – Increase learning opportunities, raise participation levels and stimulate a demand for learning for all citizens.
- ❖ **Ensure Quality** – Establish mechanisms for quality assurance, evaluation and monitoring in order to ensure a consistent progression towards quality improvement.

A thematic review on adult learning draft report (OECD, 2004) identified areas in these building blocks in which adult education policy has begun to play a useful role. These include:

1. Improved policy coordination and coherence amongst stakeholders.
2. Enhanced exposure and awareness of the benefits and value of adult education and learning to citizens.
3. Creation of well-designed co-financing opportunities.
4. Improved delivery and quality control of adult education programs and initiatives.

The promising practises outlined below are examples of one or more of these building blocks. The examples illustrate the various ways in which countries are using adult education policy and programs to support and develop a lifelong learning strategy.

### **The Role of Collaboration and Partnerships**

*Adult learning systems are complex and involve a variety of federal and state ministries, the private sector, NGOs and educational providers, with different objectives. Ensuring coordination between the different actors and potentially conflicting objectives can contribute to promote adult learning...to avoid duplicities, effectively utilize public finances, and develop user-friendly adult learning systems, there is a need to coordinate adult learning with related areas. (OECD, 2004, p. 97-98)*

Developing adult learners at a young age, ensuring compatibility between training and employment, linking adult learning to social welfare programs and involving social partners are four areas where coordination and collaboration between various stakeholders involved in adult education is a necessity (Aitchison, 2004; OECD, 2000; European Commission, 2002). Often the responsibilities for adult education policy are split between several levels of government and across a wide variety of stakeholders. As a result, the creation and implementation of adult education policy can be both a complex and disconnected process.

In an effort to address the lack of collaboration and partnerships in adult education policy development, a variety of countries have experimented with programs and strategies to:

1. Foster collaboration and partnerships with social partners.
2. Recognize and address the limitations of the policy framework.
3. Define targets for policy implementation.

## **EXAMPLES OF PROMISING PRACTICES – COLLABORATION AND PARTNERSHIPS**

### **Foster Collaboration and Partnerships With Social Partners**

There is a general recognition that collaboration with social partners is the key to improving participation of workers in adult education initiatives. From the design and delivery of educational programs to their role in the recognition and certification of learning, social partners are a principal ingredient in the success of adult education initiatives (Council of Ministers of Education, Canada, 2004; OECD, 2004).

There is growing emphasis being placed on developing effective partnerships between governments, the private sector, NGOs and CSOs. This trend reflects a potential important shift in the role of government particularly in industrial countries where learning needs are dramatically on the rise as knowledge increases at an ever-accelerated rate and the labour market increasingly is demanding enhanced qualification of people in order to remain

competitive. Governments may not, for practical reasons, be able to respond in a timely and appropriate way. As this occurs the role of social partners in the provision of education in general, and adult education in particular, is likely to grow. As this trend is beginning to become evident the role of governments to initiate and provide effective oversight of adult education policy is becoming critical. (Canadian Delegation, 2004)

One example of this connection with social partners is found in Portugal where the National Agency for Adult Education and Training (ANEFA) established in 1999 has supported the creation of 28 accreditation centres which validate and recognize non-formal and informal skills obtained by individuals. "The network of RVCC (Recognizing, Validating and Certifying Competences) centres is set up based on the accreditation of public and private entities. The RVCC is strongly established in the community to which they belong, which include enterprise and social partner associations." (OECD, 2004, p. 101)

In Canada, successful partnership and collaboration between business, labour and government is evidenced in the "Workplace/Workforce Learning" initiative in Prince Edward Island. (Council of Ministers of Education, Canada, 2004)

Whether it is in respect to the successful literacy initiatives (Liebowitz, Robins and Rubin, 2002), the integration of the low skilled worker into the labour market (Loos, 2002) or the development of a lifelong learning policy (Canadian Delegation, 2004; European Commission, 2001), it is through the alignment with and connection to the variety of social partners that adult education policy can be implemented in a coherent and responsive manner.

### **Recognize and Address The Limitations of Existing Policy Frameworks**

As Anderson (2004), the European Commission (2001) and others (Ra, Choi & Kim, 2004; Government of Canada, 2002) indicate, adult education and adult learning have only recently become policy priorities. The role and responsibilities of national, regional and local governments with respect to adult education is still being defined in many countries. While there is a trend in some nations towards providing increased responsibility for adult education to lower levels of government, in others there is a move towards a more centralized authority for adult education policy. What is consistent across many countries is the focus on raising awareness of adult education and adult learning and developing coherent policy processes and frameworks. Table 3 summarizes some of the benefits of different policy delivery frameworks.

**Table 3: Summary of Policy Delivery Frameworks**

<b>System</b>	<b>Benefits</b>	<b>Constraints</b>
Centralized system for adult education and adult learning policy development	<ul style="list-style-type: none"> <li>❖ Greater national policy planning capacities</li> <li>❖ Specific information on funding allocations</li> <li>❖ Knowledge of key policy makers</li> </ul>	<ul style="list-style-type: none"> <li>❖ May incur more rigidity and bureaucracy</li> <li>❖ Difficulties in recognizing and responding to local needs</li> </ul>

System	Benefits	Constraints
Subsidiary system for adult education and adult learning policy development	<ul style="list-style-type: none"> <li>❖ Defines policy at the national level but gives local level the ability to determine how best to implement policy</li> <li>❖ Promotes efficiency</li> <li>❖ Reduces bureaucracy</li> <li>❖ Increases response to local needs</li> <li>❖ Increases innovation</li> </ul>	<ul style="list-style-type: none"> <li>❖ Lack of coordination between stakeholders</li> <li>❖ Lack of understanding of roles and responsibilities of stakeholders</li> <li>❖ Unequal balance of power</li> </ul>
Federal system for adult education and adult learning policy development	<ul style="list-style-type: none"> <li>❖ Monitors and assesses quality</li> <li>❖ Improves response to local needs</li> <li>❖ Improves financial control</li> </ul>	<ul style="list-style-type: none"> <li>❖ Structures may be fragmented</li> <li>❖ Lack of understanding between stakeholders regarding their responsibilities</li> <li>❖ Unequal balance of power</li> </ul>

Countries such as Germany, Austria and Switzerland have begun to implement strategies aimed at addressing the constraints associated with the federal system of policy development in adult education. These countries have managed to help develop the market for adult education through setting national standards and offering incentives.

*In Austria, for example, there is not one authority for adult learning, the Länder have the responsibility but not the same structure for adult as for primary and university education. The national government is responsible for some aspects of policies, particularly through Folk High Schools and labour market programmes. The regional governments have responsibility for other programmes and have developed individual learning accounts and voucher systems; there is substantial variation among them in their practices and funding levels. However, mobility among the Länder may lead to instances where differences in what ILAs or vouchers can create problems for individuals who move. One priority for national policy might therefore be to obtain better information about differences among Länder, and then devise corrective policies (including potential funding or regulatory policies) to moderate those differences that seem too large. (OECD, 2004, p. 103)*

With respect to policymaking, the OECD (2004) suggests there are three main roles that need to be carried out:

1. **Policy Making** - In the policymaking role, the primary function is to serve as a central authority for adult education. Responsibilities include improving the provision of services, supporting research and providing information and guidance.
2. **Coordination** - In the coordination role, responsibilities focus on developing mechanisms for joint delivery where appropriate, improve information and counselling, or set up better evaluation efforts, rather than simply providing a forum for providers to share information about their activities.
3. **Advisory** - The advisory role focuses on including partners in the policy discussions and providing advice to the main body in charge of adult learning. To varying degrees, several countries have adopted approaches to adult education policy development that acknowledge and support these three roles.

To varying degrees, several countries have adopted approaches to adult education policy development that acknowledges and supports these three roles.

There is such a wide range of policy to develop with respect to adult education and so many government groups that need to collaborate to achieve a coordinated policy response, some countries have created specific institutions that have different levels of policy responsibility to meet this complex challenge. Finland and Denmark provide two examples of the range of approaches utilized in adult education policymaking by centralized and decentralized countries.

In Finland, the Adult Education Council is a Ministry of Education expert body appointed by the Council of State for periods of three years. It performs tasks assigned by the Ministry of Education such as research on adult education and following the domestic and international development of adult education. The Council submits motions and proposals to authorities and other bodies on the development of adult education (OECD, 2004).

In Denmark, up until September 2000, there were three councils with overarching tasks in adult education: (1) a co-ordinating council addressing the overall adult education and training area by gathering the chairpersons of the councils dealing with education including adult education and training activities (the so-called VEU council); (2) a council on the provision of courses under Open Education; and (3) a council on a Support Scheme (VUS). Recently, Denmark merged the three different councils into the Adult Education Council. This council includes social partners and is the main body that provides guidance to the different ministries concerned with adult education and continuing training (OECD, 2004).

As evidenced above, one method to address the lack of coordination between the different partners involved in adult education is the creation of a coordinated institution for policy formation and program delivery.

### **Define Targets for Policy Implementation**

Setting goals and targets for adult education policy is another approach that has been used with some success by countries that are attempting to be consistent in their policies across stakeholder groups. To build on and strengthen policies that promote adult education and support lifelong learning, several countries have added in numerical targets and timelines specific to the countries area of need (i.e. basic literacy programs).

In the United Kingdom, the Skills for Life Strategy aims to reduce the number of adults with literacy, language and numeracy difficulties from one in five adults to one in ten or better, with a target to help 1.5 million adults achieve level 2 national certificates by 2007. It has led to the establishment of ten "Pathfinder Projects" that focus on the national basic skills curriculum in each of the nine English regions and the prison system. (Council of Ministers of Education, Canada, 2004; UK Department for Work and Pensions, 2004)

For many countries, setting targets has then facilitated the collaboration of all stakeholders and social groups in order to develop strategies to meet the established target.

### **Creating Value in Learning and Fostering a Learning Culture**

As indicated in the previous section, there are three main types of learning. In many countries, the learning that is considered most valuable by citizens is that which is completed at an educational institution (formal learning). However, as discussed earlier, informal and experiential (non-formal) learning opportunities contribute significantly to the overall skills,



knowledge and competency that a citizen develops over their lifetime (Marsick & Watkins, 2001).

*Ensuring adequate information and visibility as to the potential returns on an investment in learning can contribute greatly to motivate an adult to participate. Different benefits and returns can be accrued to adult learning. Economic benefits are normally expressed in terms of wages, employment and labour productivity ... There can also be other, non-economic benefits like greater self esteem, increased social interaction or participation in political life. (OECD, 2004, p. 35)*

While the value of and reward for attaining diplomas and certificates tends to be transparent to learners and employers, that same transparency is not yet apparent in the areas of informal and experiential learning (European Commission, 2001). As early as 2001, significant work had been done nationally and at the European Union level to promote and facilitate the transfer and recognition of formal qualifications. However, the challenge of creating transparent value mechanisms for informal and experiential learning is still one that countries are struggling with today (Colardyn & Bjornavold, 2004).

In an effort to increase the transparency of the value of all types of learning and foster a learning culture, a variety of countries have experimented with programs and strategies to:

1. Raise awareness of the value of learning.
2. Recognize prior learning assessments (PLA).
3. Provide information and guidance support.

## **EXAMPLES OF PROMISING PRACTICES – CREATING VALUE IN LEARNING AND FOSTERING A LEARNING CULTURE**

### **Raise Awareness Of The Value Of Learning**

For many citizens and employers alike, the value of formal learning is viewed as a way of increasing their economic standing. Developing a system that places equal value on informal and experiential learning is seen by many as the key to being able to cultivate and achieve the benefits of lifelong learning. (Tuijnman, 2003)

In addition to the need to increase the perceived value of informal and experiential learning among citizens, there is also a need to increase awareness and participation for disadvantaged groups. There have been several research studies indicating that the higher educated are the ones who see the value of continual education and/or upgrading of skills and are the ones most predisposed to participate in informal and/or experiential learning opportunities (OECD, 2004; Baran et al, 2000). Under-investment in learning seems to be more prevalent in the case of low skilled, older workers and low-income earners (Cross, 2004; Ottersten, 2004; Watson, 2001).

Issues of motivation and lack of adequate information on the rate of return of individual investment in education are two areas where the OECD (2004; 2001) argues that policy can play a key role in increasing the value attributed to all forms education and lifelong learning.

## **Motivation**

The motivation of adult learners influences their decision to participate in formal, informal or experiential learning. For many, motivation to participate increases when the economic or social benefits of doing so are clearly articulated (Driscoll 2000; Baran et. al, 2000; Keller, 1987). Participation is also increased by well designed and practical content that can be used in daily life and is delivered in a manner consistent with the needs of the learner (European Commission, 2002; Bohlin & Milheim, 1994; Knowles, 1980).

*For example, one of the key difficulties in increasing participation in adult literacy programmes is that the present content of most programmes is not attractive enough to induce low-skilled adults to participate. A number of countries have modified their literacy curriculum to address practical content and real-life issues, i.e. the teaching of literacy skills is combined with practical courses that assist adult learners in managing their daily lives. This approach can ensure that the learner will obtain particularly useful results from the course. (OECD, 2004, p. 39)*

It is generally those who are more highly educated that actively participate in the formal adult education system. These individuals are able to recognize the immediate value of continued adult education and skill development and are better able to fund their participation in those activities that interest them. However, results of cost-benefit studies show that the total rate of return to individuals [for participating in formal education] remains relatively low, unless the direct or indirect costs of studying full time is subsidized by their employer or the government. It is suggested that the results are low because of the loss of earnings during the study period and the short time for adults to recover this lost revenue. Some countries, Canada included, attempt to indirectly address this issue through national student loan programs and registered education savings plans. (OECD, 2004; Council of Ministers of Education, Canada, 2004; Government of Canada, 2002).

## **Rate of Return on Investment in Education, Learning and Training**

While research is now beginning to identify the rate of return on an investment in adult learning, the challenge is to make these meaningful to the lower educated and/or disadvantaged population (OECD, 2004; Tuijnman, 2003; Phillips, Phillips, Duresky & Gaudet, 2002). Before judgement can be made about the economic advantage of adult education in any form, there is a need for a more effective way of capturing and analyzing data about individual and organizational investments in training and education. To capture the appropriate data, some companies have modified their accounting practices to allow training assets to be placed on the footing as tangible assets (Gustafson & Schrum, 2003). The challenge lies in the need for new and accurate accounting and analysis tools that will adequately assess the value of the human capital and intangible knowledge assets in an organization (Colardyn & Bjornavold, 2004; European Commission, 2002).

Some countries have been able to improve the motivation to participate in training by strengthening the links between wages and skills development. "The concept of pay-for-knowledge compensation plans is an approach to valuing training in wages" (OECD, 2004, p. 38).

Denmark adopted a qualifications-based salary system, which includes recognition of training participation as part the wage setting procedure in different sectors, such as the metal industry. Industry partners agree on a system of identification and recognition of qualifications. Joint enterprise committees (either works councils that are composed of the

employer and employee representatives or special training committees on occupation training) jointly agree on the criteria for determining the salary level of individual workers. This criterion includes vocational training background, knowledge and skills related to the job function, job responsibility and flexibility. For the individual worker, the process can include competence assessment and recognition of prior learning (Hovels, Kraayvanger & Roelofs, 2004).

Pay-for-knowledge compensation plans do require significant changes in salary processes, which tend to translate into increased administrative costs. However, the benefits of this approach for the organization include improved productivity and the creation of higher quality products. In turn, the benefits for the employee include higher job satisfaction, increased compensation for their skills and an increased commitment to the organization. (OECD, 2004; Senge, Roberts, Ross, Roth & Smith, 1999)

## RECOGNIZING PROMISING PRACTICES - PRIOR LEARNING ASSESSMENTS

Recognition of prior learning (RPL) allows individuals to not only receive recognition for learning they have undertaken in informal and experiential settings, it also allows individuals to develop their skills further by building on what skills and knowledge they currently possess. A mature RPL approach often leads to shortened training time and fosters more active involvement in the education and training system by those individuals who have previously not participated in adult learning experiences. (OECD, 2004)

To embrace RPL as a national or regional policy there is a need to develop a competency and skills recognition process and to create common standards and descriptions for competency and skills mapping. The labour market and employers must be convinced to accept qualifications gained through prior learning assessment. The nation as a whole must recognize that knowledge and skill gained through informal or experiential learning have value to citizens. (Council of Ministers of Education, Canada, 2004; Colardyn & Bjornavold, 2004; European Commission, 2001)

Several countries have legislative policies and have established RPL systems that allow for the complete recognition of informal learning qualifications, while others allow for the partial recognition of prior knowledge to gain access to formal education (OECD, 2004).

*In Denmark, schools provide an individual competence assessment with a view to determine the applicant's practical and theoretical qualifications/competences. The school gives credit for prior learning and also assesses the individual's theoretical and practical competences. On this basis, it draws up an individual study or training plan, indicating the recognised elements, and describing what the individual is lacking towards a full study programme. The content of the individual study plan thus depends entirely on what the individual's recognised competences are. It may be a matter of a few months in order to complete the study/training; or it may be that the person only lacks the final exam to be fully qualified. (OECD, 2004, p. 41)*

Several Canadian provinces have major initiatives and/or have developed policies to support Prior Learning Assessment and Recognition (PLAR). In Ontario, the focus of PLAR is on developing guidelines to support mature students who are working towards an Ontario Secondary School Graduation Diploma. "The process provides returning students with a formal evaluation and accreditation process through which they could earn credits toward their high school diploma" Council of Ministers of Education, Canada, 2004, p. 38). In British Columbia, postsecondary institutions, like Royal Roads University, encourage potential

learners who do not have an undergraduate degree to apply and go through a rigorous PLAR process (Royal Roads University, 2005).

There are a variety of ways in which countries have attempted to recognize the value of informal learning, RPL being the most common. Examples of other programs to recognize informal and experiential learning include:

- ❖ The national system of recognition, validation and certification of competencies (CCRV) in Portugal (Council of Ministers of Education, Canada, 2004) .
- ❖ The EUROPASS which provides a thorough overview of educational attainment and work experience for individuals in European Union countries (European Commission, 2002).
- ❖ The credit bank system in Korea that allows individuals to “bank” credits from different types of institutions (Ra, Choi & Kim, 2004).

With each of these methods, the focus is on providing a mechanism by which individuals can receive formal recognition for all types of learning, be it formal, informal or experiential.

### **Provide Information and Guidance Supports**

One of the common hurdles faced by policy planners is how to provide opportunities for disadvantaged and low -skilled citizens to become active participants in the adult education system. For this audience, recent research indicates that there is a general lack of awareness of education programs and that the disadvantaged require some guidance and formal support as they begin to explore the options available to them. (European Commission, 2001; Baran et al, 2000)

There is a general consensus that information about adult education and lifelong learning programs should be free to citizens, however the question of how guidance and counselling support is implemented is still under consideration in many countries. It has been suggested that a two-tiered approach be adopted whereby the information and initial personal coaching is provided free of charge, but that focused career guidance and long-term follow up and support be a user-fee.

*In the Netherlands, several stakeholders emphasized that certain incentives, such as voucher schemes, are bound to miss their objective if potential learners are not adequately informed and counselled about learning opportunities...Lack of awareness about their own needs and lack of awareness about the market demand for skills hinders many adults, especially the low skilled, from undertaking learning activities. This remains an issue even if they are willing to learn, because of their insufficient knowledge about how to use available information and guidance services. (OECD, 2004, p. 44.*

Several countries have adopted specific strategies to address the lack of information and requirement for guidance and support. Examples are provided for each strategy.

#### **1. Creating electronic databases of educational information.**

Many countries have electronic databases that describe and connect individuals with educational opportunities (Canadian Delegation, 2004). In Ireland, a national website of learning opportunities is being developed that will be widely available and updated regularly. It will be supported with information kiosks and available in local libraries and community centres. (Council of Ministers of Education, Canada, 2004)

In the UK, online centres will provide each citizen an access point to eGovernment services and information (Cook & Smith, 2004). While electronic databases solve the immediate need of collating and indexing information, concern has been expressed that one of the main challenges to the eGovernment initiative is that access to this information does not become a function of an individual's ICT ability but rather, is open and equitable (Loos, 2002).

In Quebec, development is underway for online support of candidates for the recognition of prior learning and competencies and the implementation of five online tools a year to support vocational and technical education participants (Government of Quebec, 2002).

**2. Providing individual support through collaboration with social partners (i.e.: trade unions, job centres).**

*In the United Kingdom, a key reform has been the integration of the Learndirect national learning advice service with local information and guidance services funded through the Learning and Skills Council. The information and guidance service provided by Learndirect, together with the local services is adjusted to the particular skill level of adult clients, and persons qualified at below NVQ level 2 are clearly said to need "personalised advice." (OECD, 2004, p. 47)*

In Norway, ten public ministries as well as representatives from business, industry, public education and volunteer associations formed the "Competence Reform" initiative. The goal is to establish learning contracts and partnerships between organizations and training institutions. Currently, "over 200 partnerships have been established between local authorities, business networks, professional sectors and trading partners". (Council of Ministers of Education, Canada, 2004, p. 40)

**3. Enrolling the assistance of employers.**

*Thousands of union learning representatives in the United Kingdom also attempt to raise information and awareness of learning opportunities among the staff. In the Netherlands, the use of "personal development plans" is currently being promoted within enterprises as an instrument to design and monitor individual routes in a systematic way. These personal development plans are updated annually. (OECD, 2004, p. 47)*

Ongoing review and identification of training needs in each sector is conducted by sector-based manpower committees and supported by the Quebec government 'Act to Foster the Development of Manpower Training' (Government of Quebec, 2002). It is the intent of this policy that the government support employers through the development and provision of appropriate tools to "identify needs, plan training activities, evaluate participants and assess the usefulness of the training" (Government of Quebec, 2002, p. 15).

**4. Supporting the formation of a network of support providers and educational brokers.**

*To induce less educated Dutch adults to participate in literacy and basic education programmes, the city of Tilburg has initiated an "Ambassadors programme", where former illiterates now work as volunteers to motivate and*

*recruit potential participants from their peer groups. Through home visits, informal contacts, and dissemination activities in the media these 'ambassadors' have recruited a considerable number of new learners. Given their own experience, they are, as role models, more likely to convince prospective learners to join literacy and other basic education programmes. (OECD, 2004, p. 47)*

There is debate about whether to establish adult education guidance or counselling services in the workplace or in educational/training establishments, there is a general consensus that formal guidance and counselling is needed in order to maximize participation. It is recognized by many that there is a need to create appropriate measurement and evaluation tools that can be used to inform the adult education guidance and counselling services. It is also hoped that these processes and tools do not become solely career focused. (Colardyn & Bjornavold, 2004; Watson, 2001)

## **EXAMPLES OF PROMISING PRACTICES – PROVIDING ADEQUATE RESOURCES AND FINANCING OPPORTUNITIES**

### **Providing Adequate Resources and Financing Opportunities**

Financing adult education opportunities and creating financing arrangements that are equitable and accessible to all citizens and social partners is a challenging task (Watson, 2001). There is a need for financial support or subsidies for both individuals undertaking formal learning and incentives for organizations to continually offer training and education experiences to their employees.

*“Given the considerable private returns generated by learning, it would be a waste of public resources to fund learning activities that would have been undertaken even in the absence of the public subsidy (the so-called deadweight effect). Therefore, it is advisable, as a general principle; to add an element of co-financing, i.e. match public support with a contribution from the recipient individual or firm. It can also be argued that the government's part in co-financing should be greater for disadvantaged groups than for prime-age, high-educated individuals”. (OECD, 2004, p. 52)*

In an effort to address the financial constraints associate with supporting adult education and lifelong learning, a variety of countries have experimented with programs and strategies to:

1. Provide incentives for all levels of government.
2. Support organizations in the continued education of their employees.
3. Support individuals in their continual skill and knowledge development.

### **Provide Incentives to Support Adult Education and Lifelong Learning**

Intergovernmental agreements allow for lower levels of government to be the beneficiaries of funds and programs which can be used to support a wide array of adult educational initiatives (formal, informal and experiential). These transfers are generally done to enhance the efficiency of publicly supported programmes and involve strategies such as matching grants, performance criteria and needs based funding. (OECD, 2004) Tuijnman (2003) notes when the implementation and management of adult education and lifelong learning programs become the responsibility of regional state or provincial governments, central/federal government funding becomes essential for program sustainability.

The United States uses a performance-based funding model in which the federal government transfers funds to the state governments who supplement these funds according to their budget. The most efficient states received extra funding as a reward based on the performance criteria defined by the National Reporting System (US Department for Education, 2004). While this model provides strong incentives for each individual state to improve the quality of their adult education programs, there is the risk of selection bias.

In contrast, the matching-grant strategies used in Canada and Mexico offer a uniform subsidy and increases accountability across all jurisdictions by the federal government. But matching-grant strategies run the risk of cultivating inequities unless differential matching rates are used. While this is an effective alternative as seen in the Canadian model for federal/provincial/territorial funding for adult education, the main difficulty in implementing this scheme is the administrative overhead. The limiting factor to the success of matching grants with differential rates is the ability of the central government to acquire, store and analyze the detailed information on adult education that is required to make the appropriate calculations and funding decisions. (Government of Canada, 2002; OECD, 2004)

The model adopted by the European Member States, the European Social Fund (ESF), provides an example of how an inter-governmental body can collaborate to finance the adult education opportunities of its member states. The ESF supports continued adult education and training activities. As a by-product of collaboration, it also promotes quality improvement in adult education programmes across the member states.

*The European Social Fund (ESF) is the EU's key financial instrument for investing in people. The ESF channels EU-funds to member countries to help develop human resources, modernise systems of education and training and ensure employability. In order to ensure that funds go to areas of greatest need, the European Commission agreed with member countries to adopt a series of objective criteria for allocating funds across the EU based on labour market and economic development needs. Based on these objective criteria, the ESF has a country-based structure, and it is left to countries to decide on how to distribute the funding to different projects... In addition to this eligibility criterion, the ESF generally requires member governments to match their own funds. An additional ESF financing instrument requiring co-financing with member countries is the Community Initiative (EQUAL), which differs from the mainstream ESF programs by its emphasis on active co-operation between member countries. Lifelong learning is an important component of EQUAL, to which over 15% of the fund is allocated. (OECD, 2004, p. 54)*

To facilitate intergovernmental funding agreements that allow for all levels of government to be the beneficiaries of funds, there is a need for cohesion and collaboration between all levels of government. In addition, the development of a central approach for adult education that guides this collaborative effort is necessary to ensure that all citizens' needs are met and that the nation as a whole maximizes its investment in adult education and lifelong learning.

### **Support Organizations In The Continued Education Of Their Employees**

*Notwithstanding the large variety of types of adult learning, the firm and the workplace remain the principle locations of learning for most adults of working age...[however] employers and workers may view potential return from training too pessimistically and therefore not engage in such activities... Well designed policies and incentives may be of much help in giving employers some external*

*push to realize that they can benefit from the upskilling of their workforce. (OECD, 2004, p. 79 – 81).*

To encourage ongoing workplace training, a number of countries provide before profit tax incentives. Some would argue that tax incentives often have a demand-driven focus that changes with the economic situation of the government and that tax incentives encourage internal training instead of external hiring. While there are several drawbacks to profit tax deductions, they can be designed in a way that minimise these drawbacks. Various strategies to achieve this include:

- ❖ Allowing only indirect costs to be deducted from training expenses.
- ❖ Permitting higher deductions if low skilled workers are trained.
- ❖ Permitting organizations with low training expense to deduct higher amounts
- ❖ Limiting tax deductions to small/medium enterprises

(Ottersten, 2004; OECD, 2004; Tuijnman, 2003).

Another type of tax incentive is payroll tax based grants and payroll tax exemptions. These are implemented by imposing an extra payroll tax on organizations to finance training activities. These types of payroll incentives allow the training to be demand-driven but often suffer from rigid eligibility criteria and excessive administrative costs. The Spanish levy/grant system requires that:

*... every company pays a training levy (corresponding to 0.7% of payroll), into a training fund after which it can try to recuperate part or all of its payment through applications for grants to finance its training plan. In practice, grants do not closely reflect company payments and therefore allow redistribution of funds towards jointly defined priorities. Equity concerns are integrated into the Spanish scheme via the requirement that funding applications were previously submitted to the firm's worker representatives, and their evaluation will inevitably play a role in the grant decision by the training fund administration. (OECD, 2004, p. 59)*

As Colardyn & Bjornavold (2004) and Tuijnman (2003) comment, supporting organizations in the continued education of their employees is possible with a well-designed and carefully implemented disbursement and tax strategy.

### **Support Individuals in Their Continual Skill and Knowledge Development**

Co-financing incentives are a common method of supporting individual adult investment in continual skill and knowledge development. There is a general recognition that “there are positive private as well as wider social returns to adult education which call for all beneficiaries including employers and employees, to contribute” (OECD, 2004, p. 55).

There are a several different approaches employed by nations to reduce participation costs for adult education including learning allowances, grants for individual participation and payback clauses.

#### **1. Learning Allowances**

Individual Learning Accounts (ILAs), are generally tax-sheltered savings which can be used for adult education activities (Government of Canada, 2002). These accounts attempt to increase individual responsibility for continual skill and knowledge development.



The Canada Education Savings Grant is an example of legislation and policy that has been put into effect to encourage families to set up a Registered Education Savings Plan (RESP).

*The Canada Learning Bond will provide \$500 to children born on or after January 1, 2004 in families entitled to the National Child Benefit (NCB) supplement for the child, followed by up to 15 annual \$100 entitlements for each year the family is entitled to the NCB supplement for the child. The legislation will double the Canada Education Savings Grant from 20 to 40 percent on the first \$500 of RESP contributions each year for families with a net income of \$35,000 or less. (HRDC, 2005)*

The challenge in many countries is the limited scope of adult education activities that qualify as an ILA investment. At present most ILAs must be used to support formal learning experiences. The use of ILAs needs to be expanded to allow adult learners to invest in individual and collective non-formal and informal/experiential learning experiences.

In some countries that provided ILA incentives, they found that the use of the ILA was open to potential fraudulent use and that there were insufficient quality controls on private sector education and training providers. For example, the UK ILA scheme experienced rapid expansion and initial success. But on examination, the government found it did not benefit low-skilled workers. It led to a number of cases of fraud and as a result, has been suspended indefinitely. Obtaining the agreement of all stakeholders on the fiscal incentives that ILAs provide, ensuring that they service the appropriate target audience and establishing quality controls are a major challenge to ILA programs. (OECD, 2004)

Similar to ILA programs are adult education programs that allow participants to “bank” time, money or both to be used at a later date for adult education experiences.

*In 2003, the Dutch government decided not to extend the pilot ILAs to a nation-wide scheme due to disagreements between the government and the social partners in determining the nature of fiscal incentives to encourage training. Instead, an alternative scheme, the Life Course Accounts, has been proposed to succeed the ILA pilots. In contrast to these, the new scheme would provide individuals with an account where they can save both money and time. It remains to be seen whether the life course account, which has a much wider scope than its predecessor, can facilitate adult learning participation. (OECD, 2004, p. 61)*

## **2. Grants and Incentives**

Grants and incentives include subsidizing the direct costs of adult education by covering all or part of the lost wages, supporting tuition fees and providing allowances for indirect costs of adult education such as travel and books. Recently, the Austrian *Länder* introduced vouchers that subsidize part of the cost of adult education. Particular attention was given to low-skilled and low-educated adults with the hope of increasing their participation in the adult education system. Austria also provides grants and incentives for participants when they have finished their initial programs. It is believed this additional incentive will act as a positive motivator for participation in other continuing education and lifelong learning programs (Schlogl & Schneeberger, 2003).

Based on the experience of several countries this type of financial incentive is most successful when the providers are screened and monitored and when there is a low barrier to enter into the programs (OECD, 2004).

### 3. Payback Clauses and Training Leave

Several countries, through legislation, support the use of payback clauses as a way to work around increasing public expenditure or individual debt. In general, payback clauses specify that the individual will need to reimburse the organization a percentage of the cost of their training and education should they leave the organization within a certain timeframe. Payback clauses may be specific to individual organizations or may be part of collective bargaining agreements (OECD, 2004). In general, payback clauses are more appealing to the higher educated who believe in the value of continual education but cite time and/or money as a limiting factor in participation.

Training leave is another strategy that is being used to promote learning participation. Workers receive compensation for wages lost while on leave based on some form of sharing agreement. For example, the government of the Netherlands developed a leave-saving scheme that allows employees to set aside 10% of their wages in a savings account that has privileged tax treatment. This money can then be used to fund personal leave for training or personal study (OECD, 2004). There are a variety of ways to finance training leave that range from governmental support, funding from employers and employee contributions, funding from social partners and unpaid leave.

Currently, payback clauses and training leave tends to attract higher educated or more economically advantaged individuals. There is a need to modify these types of arrangements so that they are more attractive and available to low skilled or economically disadvantaged workers.

Supporting the individual in their continual skill and knowledge development has been argued by a number of adult education professionals as being a key to promoting an increased accountability by government, social partners and the individual in adult education and ultimately, lifelong learning. (Council of Ministers of Education, Canada, 2004)

### EXAMPLES OF PROMISING PRACTICES – IMPROVING DELIVERY AND ENSURING QUALITY

Adults often stop participating in adult education opportunities because of the poor quality of the program, the lack of relevance to their immediate needs and the absence of meaningful content (Driscoll, 2002; Tweedell, 2000). As a result, quality control, program assessment and evaluation are areas that must be considered when developing adult education strategies. In an effort to improve the quality, content and delivery of adult education several initiatives have been implemented. These initiatives include:

1. Integrating educational institutions.
2. Promoting flexibility and distance learning.
3. Ensuring quality of educational programmes and providers.

#### Integrating Educational Institutions

As noted earlier in the report, several countries have begun to adopt an integrated centre approach to adult education. In many countries, this centre provides the basic need for information to career guidance to vocational training all under one roof. The aim of integration is to address the OECD (2004) suggestion that “the diversity of agencies involved in adult learning might be detrimental to the quality and effectiveness of the learning programmes delivered” (p. 73).

An effort is being made now in Quebec to harmonize the services offered by Emploi-Quebec and the Ministère des Relations avec les citoyens et de l'Immigration and coordinate with school boards and local employment centres. The assumption is that in order to encourage adults to engage in an education plan for, in particular, basic education, guidance and support services need to be provided and need to be consistent in their approach, offerings and impact (Government of Quebec, 2002).

### **Promoting Flexibility and Distance Learning**

*Making learning compatible with daily lives of adults, who may be working, unemployed or out of the labour force but with family responsibilities, can be a feature of effective delivery by easing adults' availability for learning. For people who are not working it may mean the appropriate scheduling of courses and flexibility in the provision as well as support mechanisms for potential family support. For those at work it may imply learning while working, learning during working hours or allowing for training leave full time or part time. Acting on lifting time related constraints could thus improve motivation and actual participation. (OECD, 2004, p. 76)*

For many countries, promoting flexibility for learning has involved:

#### **1. Providing financial support for full time studies**

The issue of lost wages while learning full-time is a key consideration for individual participation in adult education. Recognizing this challenge, the Adult Education Initiative in Sweden focused on providing free full time upper secondary education to unemployed people. More than 90,000 people took advantage of this policy initiative and it was deemed a success as it raised the educational attainment of low skilled workers during a time of high unemployment. (Tejada, 2004)

#### **2. Introducing flexible learning pathways; and/or distributed learning**

Today, adult learners are demanding more flexibility in their learning experiences. As a result, many courses and programs at educational or training institutions are offered on evenings or weekends in order to maximize participation. The use of portfolios, competencies, learning inventories and prior learning assessments are alternative ways in which an individual can create flexible learning pathways. ICTs are being used increasingly as a method by which to increase access to basic education, support rural learners and provide alternatives to working adults. The critical aspect of the ICT choice is that the delivery medium must be designed to meet the specific characteristics of the target population. For this reason, many countries use radio and television in addition to ICT for foundational skills education (Council of Ministers of Education, Canada, 2004).

It is not only foundational skills that are moving toward a more learner-centred, flexible model. Being able to adapt courses and learning experiences to the unique needs of the learner or in response to the needs of the labour market appears to be effective in increasing individual participation and motivation in these programs (Driscoll, 2000). While there are several examples in the production schools of Denmark or the Job Factory of Austria, an example of this approach in Canada can be found in Manitoba. The Adult Learning Centres Act recognizes adult learning centres as different from secondary schools and as such, provides them with a "governance and educational accountability framework to provide tuition-free high school completion credit programs" (Council of Ministers of Education, Canada, 2004, p 33).

There is an increasing trend to move more of adult education content and courseware to the online environment. Spain has a learning system that is delivered online free to all in an effort to increase access and participation in adult education programs. In Korea, participation and exposure to adult education options is facilitated by the Open University. Fees at the Korean Open University are three times lower than the traditional universities. In Korea, this has resulted in 20,000 plus learners enrolling in adult education programs. (Ra, Choi & Kim, 2004)

### **Ensuring Quality**

*Poor-quality programmes and lack of knowledge of programme or policy results can be important factors contributing to low investment and participation in adult learning. Quality control, programme assessment and evaluation should therefore be integral components of adult learning systems; by verifying what works and what does not, for whom and in what circumstances. (OECD, 2004, p. 90)*

While providing quality programs is in the self-interest of the providers, it is also a key component of a scalable adult education initiative (Latchem & Hanna, 2001). However, assessing, monitoring and ensuring continuous improvement in the quality of learning programs and educational initiatives is a task that requires collaboration between all stakeholders and the development of accurate assessment measures. To address this challenge, some countries have established institutions charged with ensuring quality while other countries rely on a more market-driven approach to quality assurance (OECD, 2004).

In countries where public funding is heavily used to finance adult educational programs, governments tend to be actively engaged in the creation and administration of quality standards and accountability measures. For example in the United Kingdom “all publicly-funded providers are expected to agree to performance targets with the Learning and Skills Councils (LSCs) and sustain a culture of continuous improvement, with biennial performance assessment undertaken by LSCs” (OECD, 2004, p. 91).

In Spain, two institutions are responsible for the quality control of adult education programs and initiatives: the National Qualifications Institute and the National Institute for Quality and Evaluation of the Education System. In addition, those in charge of administering Spain’s training levy also have a role to play in ensuring that the funded training activities fulfil quality standards.

Austria, through its Quality Seal program and Germany, in cooperation with the Lander, are examples of a market led approach to quality assurance. Both countries rely on the collaboration of training organizations, social partners and members of formal educational institutions to develop their own criteria for the “certification” of a training program or educational initiative. Government approved certified programs act as an incentive for learning providers to maintain quality and they act as a tool for potential learners to use in their selection process.

One of the key challenges identified by the European Commission Working Group on Quality Indicators for Lifelong Learning was the lack of tools and assessment techniques to measure the quality of lifelong learning and its associated adult education initiatives. While quality indicators were recommended for 15 areas of lifelong learning, it was recognized that for many, the existing indicators were no longer appropriate or relevant. Experiential (informal) learning was identified as the area in greatest need of assessment tools (European Commission, 2002; European Commission 2001). Tuijnman (2003) and Watson (2001)

advocate for research and development into new tools to effectively assess the quality of adult education initiatives and subsequently, lifelong learning programs in order to inform policy decisions and create a sustainable model for lifelong learning.

*Multiple indicators organised in a multilevel framework are required for the monitoring of progress towards the implementation of lifelong learning for all. But given the current state of play of the social sciences, and in the particular of survey practice and indicator measurement, the time when a holistic and comprehensive framework of lifelong learning indicators can be fully implemented lies far in the future (Tuijnman, 2003, p. 471).*

## **SUMMARY**

This section has highlighted some of the adult education and lifelong learning promising practices that various jurisdictions are beginning to implement in an effort to support their adult learners and to maximize their participation in the global knowledge society. Four areas where adult education policy has begun to play a useful role were used to frame this section and provide a way to organize the various national and international adult education policies, programs and initiatives.

From our discussion of promising practices it appears that the following themes should be considered when developing a Pan-Canadian policy framework:

1. Coordination/collaboration between all stakeholders.
2. Recognition of the value of continued education by all stakeholders.
3. Development of alternative and varied financial measures.
4. Promotion of program quality and the development of new measurement and assessment tools are still policy hurdles for many countries.

For many countries, the nebulous arena of experiential educational programs and initiatives is still a policy and program challenge.

## LEGISLATION, POLICY AND PROGRAMS

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### OVERVIEW

Government legislation and supporting policies provide the economic and social foundation for implementation of effective, timely and targeted national, provincial, territorial and community based programs to address the adult learning and employment needs of our citizens. In most Canadian jurisdictions public school and post-secondary education legislation, university and college acts and/or labour legislation guides the creation of adult learning policies and the development and delivery of adult education and vocational education programs. At present no single piece of legislation exists in Canada that addresses the specific goals of either a federal, provincial or territorial adult learning system nor does any single piece of legislation exist that describes the intended impact of adult education or lifelong learning in Canadian society as a whole.

To guide national and international policy makers in their pursuit of lifelong learning as a goal of government, participants to the Hyderabad Conference, of which Canada was one, agreed to move toward a unified vision of adult education and lifelong learning through "extensive consultation, information sharing, dialogue and participation, as the basics for the development of a multi-sectoral policy framework specifying priorities, strategies and institutional support" (UNESCO, 2002, p. 2). They further agreed that existing legislation and policies must be reworked to address the issues of adult education and lifelong learning, and that the creation of national lifelong learning networks must be a priority. To help us achieve this in Canada, we must explore how adult education policy is created and implemented in other nations and international organizations.

### POLICY AND STRATEGIES DEVELOPED BY OTHERS

There is a need to learn from others and to exploit their lessons learned to create a more effective adult education and lifelong learning system. Governments like Australia, the UK, the EU and other international agencies have attempted to create national and state level policies to support the delivery of adult learning programs. Building upon the discussion of promising practices, we will explore some of these attempts at policy development and the strategies employed to address them.

Martin (2001) notes that major gaps in our understanding of adult learning often hinder a nation's ability to diagnose the requirements for and to create effective policy. He continues to explain that some of the issues that contribute to this gap in our understanding are:

- ❖ No single or unifying definition and understanding of what encompasses adult learning exists to guide policy makers.
- ❖ Educators and researchers know more about what doesn't work in adult education than they know about what does work.
- ❖ Governments do not clearly understand who actually participates and benefits from their existing adult education programs and therefore have no clear target audience.

Existing adult education policies and programs are often targeted at low income, low education populations. But research has indicated that well educated and better skilled individuals are more active participants in the adult education system than those with less education and lower incomes. Low income, low education participants and potential participants claim that the benefits of adult education are not always clear to them and therefore they do not participate (Martin, 2001).

Our current information and management systems do not have the appropriate tools and procedures to actually track and analyze public and private spending on adult education and work place training; nor do we have a method of tracking and sharing best practices in adult learning. If governments are to succeed, they need to overcome these gaps before they can develop effective adult education, lifelong learning and vocational training policies and programs (Martin, 2001).

### **Australia – Vocational and Lifelong Learning Strategies**

The Australian government's national strategy for vocational education and training is driven by economic necessity and is summed up in this mission statement:

*... ensure that the skills of the Australian labour force are sufficient to support internationally competitive commerce and industry and to provide individuals with opportunities to optimize their potential (Brown, 2000, p. 8).*

As they implement this mission the Australian government is integrating learning in the workplace, community based learning, and formal and informal education and training, into a single lifelong learning approach. The challenge they face is to create national and state financial mechanisms that will support this integration. One of the first steps used by Australia was to create community based learning circles that addressed issues of civic importance and community needs. Second, the government embraced the use of distance learning and ICT technologies to provide geographically isolated Australians access to various learning opportunities (Brown, 2000).

Candy (2000) states that within the Australian context, lifelong learning is compartmentalized between federal, state, the private sector and voluntary stakeholders. This compartmentalization raises issues of connectivity and infrastructure support. He argues that their needs to be a collaborative rather than a confrontational approach among all parties, in what he calls a "whole government" approach, to create a unified lifelong learning framework.

Australian companies view time and money spent on employee training and education as the cost of doing business rather than as an investment in their business. Candy (2000) goes on to say that this short-term perspective fails to realize that if the Australian economy is to compete in the global market place, then companies must invest in their staff to ensure they become committed lifelong learners. This corporate attitude can be changed by government through the judicious use of tax incentives that support investment in adult education and lifelong learning programs.

### **European Union – A Comparison of Vocational Training**

Darmon, Frade & Hadjivasiliou (2002) claim that until recently continuous vocational training (CVT) has been a reactive, mechanistic and neutral response by companies and governments to market pressures and technology changes. They note that continuous vocational training since being established in France and Britain in the late 1950s and mid 1960s, has experienced a radical change and is now been restructured to be more competitive and flexible. France codified CVT in legislation that includes regulations for company training, the right to training leave, and special contracts that allow a mix of employment and subsidized training for new and inexperienced employees.

Livingstone (2002) notes that employer sponsored adult job and vocational training programs are more readily available to workers (5% in mid-1960s to 20% in mid-1990s) but that the

majority of the programs reflect the need to comply to regulatory or certification requirements imposed by various levels of government. Employer investment in long term and career related programs have not shown a similar increase.

Within the EU, the trend appears to be away from the establishment of national standards for vocational training and certification and a move towards international certification that allows cross border portability of skills and experiences by multi-national companies. This trend has led to economic deregulation, deregulation of labour markets, and decentralization/deregulation of labour relations. This has obvious impact on the national vocational training legislative framework (Darmon, Frade & Hadjivasiliou, 2002).

France and Spain have created an environment that could be termed 'social compromise'. These two societies have purposefully created a vocational training framework that attempts to balance between an increasingly dominant market place and the need for society to provide employee protection, promotion and individual rights and the rights of the unemployed. In comparison, the UK has moved toward a vocational training environment that is solely tailored to the economic needs of the nation. The UK's welfare and social issues have been subordinated to the economic demands of the nation (Darmon, Frade & Hadjivasiliou, 2002).

The United Kingdom's regulatory framework has been termed the 'enterprise culture'. This enterprise culture is supported through the creation of quasi-markets. Examples of these quasi-markets are: the internal market in education embraces institutions that are part of the Training and Enterprise Councils and an example of a provider market is the National Health Service. The framework is also characterized by decentralizing of labour relations so that companies and organizations do not have to deal with unions when planning and implementing vocational education programs. Education has become an instrument of the economy. (Darmon, Frade & Hadjivasiliou, 2002)

In contrast to the UK, Spain's vocational training framework has both a social and an economic aim. As democracy in Spain evolved over the past several decades, the responsibility for education and training was devolved from the central government to the politically autonomous regions. Unions have been active participants in labour relations, and training has been seen as key a platform for all parties to actively plan and manage. As a result of the social agenda and close collaboration with unions, the Spanish government devotes 50% of its vocational training taxes to the unemployed and 50% to continuous training. Training is deemed to be a three-way responsibility: government, the employer and the employee. (Darmon, Frade & Hadjivasiliou, 2002)

The French approach to continuous vocational training is somewhere between the UK and Spain. Today there are two opposing camps: one supporting competitiveness and the other arguing for social solidarity. French government adult education policy has been influenced by the desire to combat exclusion through the implementation of solidarity principles and methods. This has impacted the vocational training framework. Decentralization of vocational training to the regions has become the norm. Freeman describes the policy making process as "statist in style, corporatist in form and pluralistic in practice" (as quoted in Darmon, Frade & Hadjivasiliou, 2002, p. 96). Labour legislation requires companies to dedicate 1.5% of their payroll to training of their staff and to support the young unemployed or pay into a mutualizing fund that is controlled by the government and is used to combat social exclusion and promote social advancement. The French government takes on more of a guiding role than a prescribing role when it comes to the use of vocational training as a tool of economic intervention.



Darmon's, Frade's & Hadjivasiliou's (2002) review of UK, French and Spanish legislation and practices found that the responsibilities for planning, managing and regulating continuous vocational training has become more decentralized. Companies and/or political regions or local councils have taken on the role of defining and guiding the training requirements of their constituents. The key characteristics of all three countries' legislation and policies appear to be flexibility, employability and deregulation. The authors argue that these trends have shifted the responsibility for education, training and employability to the individual, versus the state or corporations.

### **Denmark – Vocational Education**

Denmark has a national vocational education and training system that recognizes the transfer of skills throughout the country and is recognized by industry, the unions and academia. Vocational education is delivered in three different ways (Cort, 2002).

**Upper Secondary School** - The Danish vocational upper secondary school program is a three-year learning experience culminating in workplace related training and a higher commercial examination. Graduates of this program must complete additional vocational training before being able to access the labour market as a journeyman, but their certificate does allow them to access post-secondary education opportunities if they wish to go on to college or university.

**Direct Vocational Training** – For those adult learners who do not wish to complete the upper secondary school vocational education program, the Danish government offers direct vocational training to those individuals who hope to work in vocational, social welfare, health, agricultural and maritime occupations. When learners graduate, they are able to directly enter the labour market in a specific trade, but are not able to continue on to post-secondary education without additional secondary school academic credits.

**Youth Education Programs** - Finally, the Danish government provides "Individual Youth Education Programmes" for disadvantaged youths who have difficulty completing traditional education programs. The aim of is to motivate young people to continue their education and training and to assist them in selecting appropriate occupational pathways. This is achieved through either:

- A two-year free youth education course that provides general qualifications and develops personal competencies. Completion of this course does not result in academic credit or formal qualifications; or
- A two year general vocational training program that is a mix of classroom and practical training and provides opportunities to enter the labour market.

### **OECD Member Countries – Some Experiences**

OECD Ministers (as quoted in Brown, 2000, p. 7) believe the key to continued national development in the 21<sup>st</sup> Century is lifelong learning. To support national development efforts, ministers indicate that their countries need to:

- ❖ Improve the foundations of lifelong learning.
- ❖ Facilitate pathways and career progressions that support lifelong learning, with special emphasis on the transition from school to work.
- ❖ Rethink the roles and responsibilities of partners in the financing and implementation of lifelong learning.

Martin (2001) characterizes OECD adult learning as the “Cinderella Sister” of national education and training systems. He notes that much of the past and current policy attention and funding of education by OECD countries has been targeted at the formal school system and transition from school to work programs. Martin continues to explain that recently the OECD has begun to embrace adult learning and he provides the following examples of positive initiatives:

- ❖ Switzerland has created legislation to implement continuous vocational training. To support this legislation the Swiss have created a project called Definition and Selection of Competencies, whose aim is to identify the key competencies required in the workplace and as a member of society.
- ❖ Sweden has launched a five-year, Adult Education Initiative, which will raise the profile of adult learning in the formal education system.
- ❖ The UK has undertaken a major transformation of its adult learning system and created community based Learning and Skills Council to guide its implementation.
- ❖ Portugal has established a prior learning system and supporting PLA centres to guide workers in the assessment of their current skills and knowledge.
- ❖ Spain has created vocational training legislation that recognizes the inclusion of informal learning experiences.

The OECD members increased interest in adult learning stems from economic globalization, greater access to information and communications technologies, a need to increase literacy to ensure worker success in today’s changing economy and a need to re-invest in the aging workforce to update their outdated skills. These changes have resulted in a policy and program shift to the white collar more highly skilled workers from the vocational workforce thus putting a greater demand on existing adult learning systems (Martin, 2001).

The OECD in its review of adult learning policies and practices recommends that when creating policy for adult learning, the policy makers must “create the structural pre-conditions for raising the benefits; promote well designed co-financing arrangements; improve delivery and quality control; and work for improved policy coordination and coherence” (OECD, 2004, p. 35).

### **The European Union – Combining Systems**

Until recently European nations have developed their education and training systems in isolation of their EU partners, creating their own education and training institutions, their own admission rule and academic calendars, and developing separate and competing education and training curricula. (European Commission, 2002)

To better coordinate the delivery of education and training across the EU, the European Commission established a number of education and training goals to be achieved by 2010. Many of these goals have a definite and positive impact on the state of adult education throughout Europe. The adult education related goals include:

- ❖ Education and training systems in Europe will be compatible enough to allow citizens to move between the different national education and training systems so that EU citizens can take advantage of their diversity.
- ❖ Holders of qualifications, knowledge and skills acquired anywhere in the EU will be able to get their qualifications and learning experiences effectively validated throughout the Union for the purpose of career and further learning.
- ❖ Europeans, of all ages, will have access to lifelong learning as a basic right.

(European Commission, 2002, p. 4)

Beyond preparing Europeans for their professional careers and economic well being, the hope is that the proposed system will in the long term contribute to their citizens' personal well being, support active citizenship in the union and their respective nation states and have EU citizens learn to respect the cultural and linguistic diversity of the union. The EC members want their education and training policies to reflect the collective European society's values of tolerance and respect for human rights (European Commission, 2002),

The European Commission (2002) took the three strategic goals described above and broke them down into thirteen achievable objectives. Although all thirteen have some impact on adult learning the ones that have the most potential to impact on the European Union's adult education and lifelong learning system are:

- ❖ **Developing skills for the knowledge society.** As the EU moves towards this objective it must identify and continuously validate what new skills are required to support the knowledge economy, then member states must ensure that everyone has equal access to new skill attainment.
- ❖ **Ensuring access to ICTs for everyone.** Universal access to ICT and educational technologies must be achieved and innovative teaching and instructional strategies must be used to design and deliver programs using the technologies.
- ❖ **Making the best use of resources.** Society must increase its investment in human resources, through strategies like private public partnerships. It must also ensure that a quality assurance system is created that respects the diversity of the European community.
- ❖ **Create an open learning environment.** This should be achieved by broadening access to lifelong learning opportunities; ensuring learning is accessible to all; creating and promoting learning paths; and promoting networks of lifelong learning education and training institutions.
- ❖ **Making learning more attractive.** Foster a culture of learning and find ways to validate non-formal learning experiences. Find strategies to motivate learners to stay in the education and training system throughout their lifetime.
- ❖ **Supporting active citizenship, equal opportunities and social cohesion.** Ensure that active citizenship and democratic values and participation are clearly promoted and encouraged throughout the education and training system.
- ❖ **Increase mobility and exchange.** Encourage mobility of the adult population through portable and transferable competencies and encouraging education and training organizations to embrace issues of mobility and competency exchange.

Many of these strategic goals were also reflected in and supported by the UNESCO Hamburg Declaration, a document that was to guide nation states through their revolution in education, training and lifelong learning (UNESCO, 1997).

### **United Kingdom – Example of Lifelong Learning Goals**

In 1999, the UK government report, 'Learning to Succeed' (as quoted in Brown, 2000) identified the following areas that needed to be addressed if lifelong learning is to succeed as a national strategy:

- ❖ Provide support for young adult learners as they join the workforce.
- ❖ Improve the quality of lifelong learning experiences delivered to adult learners.

- ❖ Assist in the growth of learning businesses throughout the UK.
- ❖ Develop Learning and Skills Councils that would support the local communities.

### **Requirements for Informal/Experiential Learning Support**

Tough (as cited in Livingstone, 2002) notes that the average adult participates in up to five self-guided learning projects and spends up to 500 hours engaged in informal (experiential) learning experiences each year. Livingstone (2002) continues to note that with the advent of widely available information technologies such as the World Wide Web, that informal learning is growing exponentially in comparison with the more formal and non-formal learning opportunities. Several different workplace studies conducted in the 1990s by Ekos Research, the US Department of Labour and the Centre for Workplace Development concluded that up to 70% of the employee workplace learning experiences could be considered informal; i.e. learning by doing (as cited in Livingstone, 2002).

Livingstone's (2002) research into the under-employed and the under-qualified in Canada and the USA confirmed that under-employed university and college graduates and under-qualified non-college workers spent as much time in informal learning as did their credentialed peers and that they actually spend significantly more time in the completion of self-guided projects, yet these pursuits are often not recognized by employers or government.

The measurement of informal adult learning outcomes is often difficult to assess. The creation of unambiguous standards which clearly describe the level of skill and competency required in achieving desired informal learning outcomes will provide a foundation upon which to support existing labour markets. The UK has created a National Vocational Qualifications System which supports the competency requirements of different sectors in the labour community. Spain has a similar system in which they define vocational pathways for skills and competency development (OECD, 2004).

"Most political leaders persist in focusing on enhancing a 'training culture' as the primary policy response, when a continual learning culture is already thriving across the current workforce" (Livingstone, 2002, p. 69). Researchers and policy makers need to concentrate more on the process of informal learning and the methods used to capture the outcomes of informal and experiential learning experiences.

### **Mexico – Quality of Adult Education Materials**

In Mexico it was found that the quality of the instructional materials and the level of practical experience injected into an adult learning experience had a direct impact on the participants' motivation to continue to pursue these types of opportunities. Mexico's successful 'Bridges to the Future' program offers native populations a combination of high quality literacy training, employment opportunities and practical life experiences all in the same course designed and delivered by local ethnic professionals (OECD, 2004).

## **CREATION OF AN EFFECTIVE POLICY FRAMEWORK**

Due to the transnational nature of adult education and vocational training, a comparison of regional and national policies that impact corporate training must not only include a review of the training and education legislative framework; it must also examine the legislation and policies supporting economic and social change. (Darmon, Frade & Hadjivasiliou, 2002). CMEC (2003) suggests that a potential adult education policy framework can be modelled

after the EC Memorandum on Lifelong Learning. The memorandum identified six major areas to consider in policy development:

- ❖ Essential skills development.
- ❖ Investments in human resources.
- ❖ Innovation in teaching and learning.
- ❖ Valuing learning.
- ❖ Guidance and counseling.
- ❖ The opportunity to learn closer to home.

A number of governments and international organizations are in the process of creating their own unique adult learning/lifelong learning policy framework. Several have articulated a list of guiding principles to assist in the creation of legislation and policy. The Australian National Training Authority (as reported in Brown, 2000) identifies the following seven attributes of a lifelong learning policy framework:

- ❖ Shared vision about the value, impact and significance of lifelong learning.
- ❖ Combining a national framework (consistency) with a strong focus on local level collaboration and networks (autonomy and flexibility).
- ❖ Funding that empowers learners.
- ❖ A bias toward investing in the front-end of the learning process (that is schools, families and pre-school learning).
- ❖ A business and work culture that values and contributes to learning.
- ❖ A willingness to undertake significant institutional reform.
- ❖ Information and feedback on performance and progress.

The Koln Charter produced during the G8 Summit in 1999 (as reported in Brown, 2000) identified a number of essential building blocks for nations to consider when modernizing their education and training systems. The ones that most impact the adult education and lifelong learning communities are:

- ❖ Mutually supportive roles of public and private finance and the need to raise the overall level of investment in education and training is required.
- ❖ Modern and effective ICT networks to support traditional methods of teaching and learning and to increase the quantity and range of education and training, for example, through distance learning is needed.
- ❖ The continued development and improvement of internationally recognized tests to benchmark student achievement must be created and managed.
- ❖ The recognition of professional qualifications and work experience must be part of the national education and training system.
- ❖ Increased attention to the establishment of clear targets in terms of higher standards and levels of achievement must be enforced.

The OECD (2000) identified a number of key features of successful adult learning systems that are reflected in the participating countries education and training environment. They are:

- ❖ Financing the adult education and lifelong learning environments is the responsibility of a wide range of actors and not just the public system.

- ❖ As the adult learning system becomes more complex, there is a need to ensure that formal processes for guiding learners through the myriad of choices is available. Brokers between education, industry and public institutions may be required.
- ❖ Programs targeted at learners who have experienced failure in the past must be designed to motivate these individuals by making their learning experience fun. Learner expectations must be effectively managed and success in the learning experience must come early to help reinforce the idea that they can succeed.
- ❖ A process of recognizing and certifying prior learning experiences must be created and maintained. Flexibility in entrance standards must be the norm.
- ❖ Adult education program offerings should be modularized to allow more flexibility and choice for the learner as they participate in their lifelong learning experiences.
- ❖ Collaboration between the education and the labour market participants is needed to establish an effective lifelong learning system. Workplace learning and on-the-job training must be an integral part of the system.

### **ABE Policy Planning**

Lauglo (2001) states "Illiteracy is a major barrier to poverty alleviation" (p. 1). He continues to explain that it is particularly important to provide support to illiterate mothers since they provide the role model and motivation for their growing children and this support will help reduce the economic and social gender gap within the impacted societies. He states that literate mothers can better protect their growing children's' health and are better prepared to support their families economic well-being. Lauglo suggests that a government that wishes to strength their ABE programs must consider the following:

- ❖ Who is the target audience?
- ❖ What is the role of government, NGOs and other agencies?
- ❖ What is the role of business and industry in the provision of ABE services?
- ❖ What language policy is required to support ABE?
- ❖ What level of institutionalization versus volunteer and community based programs should be supported?
- ❖ What other topics, other than literacy and numeracy, should ABE programs include?
- ❖ Can ABE be formally recognized in the public education system?
- ❖ How can educational technologies be used to support ABE?
- ❖ Can a more participatory, learner centred pedagogy be employed?
- ❖ How can the government build local support for ABE?
- ❖ What type of monitoring and quality control system is needed?
- ❖ How do we fund the ABE programs?

Building upon the above questions, the World Bank offers the following advice to organizations and governments implementing ABE programs (Lauglo, 2001):

- ❖ ABE should be the foundation for achieving "Education for All" - the World Bank's goal for lifelong learning.
- ❖ Provide strong political leadership for ABE programs.
- ❖ Target women and out of school young adults.

- ❖ Be responsive to the local needs.
- ❖ Seek out ways to initiate and support ABE programs in established community groups.
- ❖ Build partnerships with others.
- ❖ Use the local language to teach basic literacy and introduce the official language once basic literacy is mastered.
- ❖ Recruit local teachers and role models.
- ❖ Ensure materials are instructionally sound and well designed.
- ❖ Provide opportunities for ABE learners to become actively engaged in the learning process.

## **FINANCING THE POLICY FRAMEWORK**

Burke (2002) notes that almost all of the funds supporting traditional adult education and vocational training are currently provided by national, state, regional or local governments. Although widely discussed, at present there are no current examples of nations providing lifetime entitlements to support educational or training programs that foster the growth of a lifelong learning culture. Timmerman (as cited in Burke, 2002) believes that lifetime entitlements to support the adoption of a learning culture should be varied according to the social and economic background of learners. Van Ravens Franchise Model (as cited in Burke, 2002) recommends that these entitlements consist of a lump sum grant to finance post-secondary studies which will become more self-financing with the age and economic state of the learner.

Australia has embraced competition for the design and delivery of adult education programs through the tendering of training programs to both the private and public sector. In Australia, the management of public funds is now more concentrated on the performance outcomes versus the guidance to providers on how to spend those funds. This has resulted in the devolution of responsibilities away from the state government to the company providing the training programs for the targeted adult populations. This has resulted in cost efficiencies without the loss of quality programming.

Bruynell (as cited in Burke, 2002) notes that about two thirds of the countries in Europe offer tax deductions for individual payments of education related expenses. Many countries with value added taxes provide a GST exemption for education and training course fees. Sweden has created Individual Learning Accounts in which citizens can deposit funds for future training or education programs. All funds deposited into the account are tax-exempt until they are withdrawn (Burke, 2002).

Celani (as cited in OECD, 2004) suggests that “pay-for-knowledge compensation plans” be used to encourage employee investment in adult education and training. A worker’s pay would be directly tied to the work related knowledge or skill that he/she had attained over the year. This would require a close link between the creation and management of individual training plans and the pay and compensation systems within organizations. This idea is similar to the qualifications based salary system adopted by Denmark. In this system, employers and employees jointly agree on the criteria for each salary level, which includes vocational training and skills and knowledge related to the job.

The ROI for an individual who personally invests in his/her own work related training and education is relatively low, unless the direct and indirect costs of study are subsidized by the

employer or government. That being said, individual ROI will vary based on economic incentives, participant characteristics, socio-economic status, and the program of study (OECD, 2004).

Procedures that provide companies with timely financial information and accounting systems that illustrate a direct ROI to the company would encourage organizations to support adult learning in its enterprise. No longer would the investment in human capital be hidden, but it would become part of the larger financial picture for the organization (OECD, 2004).

Blair and Wallman (as cited in OECD, 2004) suggest that training, education and professional development be treated as an intangible asset and that it be accounted for in the same way as we account for tangible assets. In addition, they suggest that measures to include human capital and measures for investment in people be included in the same way that physical capital is addressed in accounting procedures.

Schroeder (as cited in Selman, et al, 1998) describes four different types of adult learning funding agencies. They are:

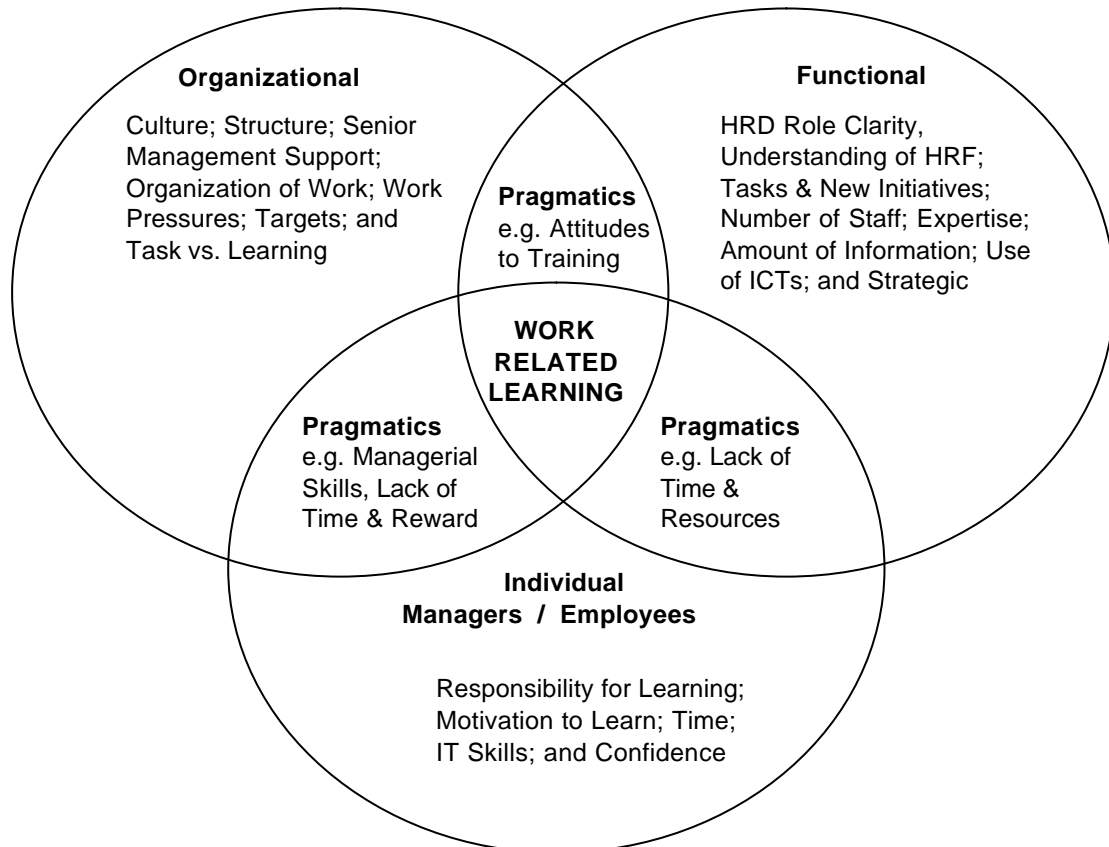
- ❖ **Type 1** – Dedicated adult education establishments (DE universities, corporate DE training organizations)
- ❖ **Type 2** – Part-time adult education establishments (K to 12 school boards, traditional universities and colleges with DE programs)
- ❖ **Type 3** – Community based educational and non-educational establishments (e.g. libraries, museums, etc.)
- ❖ **Type 4** – Special interest agencies (churches, the AIDS foundation, etc.)

## **FACTORS THAT AFFECT POLICY DEVELOPMENT**

As we consider what adult education and lifelong learning policy must address, we must consider the factors that impact the adult learner. In a comparison of 28 work related case studies, Sambrook (2001) found that there were significant similarities influencing the lifelong learning environment in and at work. She categorized these similarities as organizational, functional and individual. As illustrated in Figure 7, each category has a number of influencing factors.



**Figure 7: Summary of factors influencing work-related learning (Original from Sambrook, 2001, p. 7)**



Sambrook's (2001) research also identified the following inhibiting factors: insufficient HRD resources; an entrenched culture; traditional ideas about training; business pressures; and ineffective management skills. Organizations that provided effect HRD support such as flexible learning solutions, facilitation versus instruction, and a supportive management team and a workforce willing to learn were more able to develop a learning culture and restructure their workforce to embrace lifelong learning and learning in the workplace.

### **The Role of Government**

Participants to the Hamburg Declaration noted that the state must provide the policy and act as the primary provider of adult education experiences for all, especially for minorities and indigenous peoples. The state must also act as the banker, monitor and evaluator of the system. Participants indicated that not just the departments of education must support adult learning; it must become the role of all government agencies. They declared that governments must engage employers, unions, non-governmental agencies, community organizations, indigenous people's agencies and women's groups in the creation, delivery and management of the adult learning system. Although governments must lead the way, they cannot do it on their own (UNESCO, 1997).

Others have argued that the role of government in the management of the adult education system must diminish, and that all participants (unions, the private sector, non-government

agencies, and local communities) that benefit from the programs must be actively involved in the development and implementation of policies and programs.

Levin (as quoted in Burke, 2002) states that the role of government is to “establish an information system on lifelong learning opportunities that includes data on availability, cost, subsidies and markets for trained personnel in a variety of occupations as well as individual data on providers”. As an example, Levin notes that the UK provides service to the less advantaged and those who do not have access to computer systems through a service called ‘Learning Direct’ which provides a telephone help line for information on adult learning and career opportunities.

### **The Role of Employers**

Employers have only taken an active role in adult education when they deemed there was a business advantage to their organization. In a survey conducted in the late 1990s of Belgium companies with 10 or more employees, it was found that those companies who stated they did not invest in workplace training for their employees claimed that: their employees already possessed the prerequisite competencies; that the company had little or no spare time to invest in training; and that there was a wide belief among managers that when employees are in training they are not productive and therefore don't contribute to the operation of the company (Vanhoven & Buyens, 2001).

Those companies that did offer training employed a wide variety of different delivery methods. Companies with less than 500 employees made more use of vocational training courses than their larger counterparts. Thus the bigger the employee base, the larger the company reported a greater mix of in-house and external delivery methods. The results of the survey found that between 1993 and 1999 companies began to treat vocational training in a more strategic and structured way. In 1999, more than 75% of the reporting Belgian companies were involved in the delivery and management of continuing vocational training. In smaller companies training was not done in a formal way, but done in a more informal ad hoc manner. The key differences between those with a formal approach versus an informal approach appeared to be creation and use of a formal annual training plan and a dedicated budget to support the plan's implementation and execution (Vanhoven & Buyens, 2001).

Senge (as cited in Wouters, Buyens & Dewetinick, 2001) indicates that providing employee learning opportunities does not ensure that organizational learning will occur. To create an organizational learning environment effective communications must occur and employees must be empowered to make improvements in the workplace. Wouters, Buyens & Dewetinick (2001) added that an organization that responds to and anticipates change will embrace learning as a strategic tool. They continue to note “this changing view of learning has far-reaching consequences for line managers, who are expected to manage the workplace as a place fit for learning” (p. 4).

Employers will have more of an incentive to invest in employee training if the training results in: greater productivity, or worker retention. Governments have attempted to encourage employer support for workplace training through:

- ❖ Legislating a minimum contribution to training, education or professional development per year.
- ❖ Provision of tax relief and subsidies linked to the employers' level of contribution to employee education.
- ❖ Tax schemes that provide incentives for companies who gain measurable benefits for training and education investments.

- ❖ Provision of infrastructure support, best practices, qualifications framework and/or the creation and delivery of training programs.
- ❖ Tax schemes that help companies value their intellectual capital and related profits.
- ❖ The creation of social partnerships to support the training of their employees.
- ❖ (Burke, 2002)

### **The Role of HRD/HRM Professionals**

Belgian companies reported (Wouters, Buyens & Dewetinick, 2001) that the need to remain competitive in the global market place, the pace of technology change, the desire to improve client focus, innovation in product development, processes and services and quality improvements were the major factors influencing their long-term business strategies and goals. HR strategies for the development of their workforce were secondary and rated low on the importance scale of organizational strategies; although when asked to rate the future of these strategies as it related to their companies, respondents rated them on par with the business strategies and goals.

The Belgian HRD professionals reported that they do not see themselves as true partners in the operation of the business. Instead they see their objectives as more of a support role that provides the development and coordination of the training function and HRD practices. The study concluded that HRD professional practices and strategies are not far reaching enough and that they continue to see themselves in the more traditional roles. If this is to change there is a need to become more engaged in the business of knowledge management and the creation of stimulating learning environments that support the growth of a learning culture. To overcome these observations the study recommended:

- ❖ Business managers must become more engaged in the HRD process and their own professional development paths must include exposure to HRD best practices and their impact on business operations.
- ❖ Senior management must recognize and position HRD activities as a strategic part of the business. Learning versus training must be the focus of HRD strategies and methods.
- ❖ HRD professionals must enhance their own professional standing and worth to the business by becoming more knowledgeable and skilled in business operations, fostering knowledge management and the growth of a learning organization and becoming the expert on learning within the organization.
- ❖ Line managers must find ways of motivating employees to embrace the ideas of continuous learning through formal and informal means. Companies must find ways of recognizing the knowledge and skills of their employees.
- ❖ Government policies must recognize the need for and encourage the integration of HRD as a core business function. Lifelong learning policies must support workplace learning.
- ❖ Government, industry and academia must create an infrastructure for lifelong learning.
- ❖ HRD research must be undertaken to validate the benefit and value that the HRD function brings to the workplace.

As learning becomes a strategic tool, the role of HRD/HRM professionals must change. No longer should they be totally focused on job specific training; they must expand their responsibilities to include all forms of workplace learning: formal, non-formal and informal

(experiential). They must foster the idea that learning is a shared responsibility between line managers and HR personnel. HRD professionals must learn how to enhance the learning capacity of their employees and must provide the processes and tools to encourage increased capacities (Wouters, Buyens & Dewetinick, 2001).

### **The Role of International Organizations**

International financial and nation building organizations can apply significant pressure on supported nation states to adopt certain policies and programs. In this environment the political economy of adult education can and is impacted by the relationship of international organizations, such as the IMF, the World Bank, the World Trade Organization and others with the supported government. The international agenda often impacts the social and political agendas of the supported government. This is evident in South Africa's attempt to realign its approach to adult education to ensure that it can compete in the new global economy (Groener, 2001).

Youngman (as quoted in Groener, 2002) claims that the "input of aid has often been of strategic significance in influencing policy and practice" (p. 54). Groener notes that as the inequities in the global economy intensify the need for an adult education global agenda increases. She notes that since the 1990 Jomtien Conference, international agencies like the World Bank, UNESCO, UNICEF and the UNDP have become more engaged in influencing national adult education policies in the supported nation states.

## **FINDINGS**

Based on the reviewed literature the following should be considered when developing legislation, policies, and programs when creating a policy framework to support the implementation of an adult education and lifelong learning system.

- ❖ Develop a common set of definitions must be developed to guide policy makers.
- ❖ Create a reporting, tracking and information management systems and ensure it is integrated with existing systems. The system must provide timely and appropriate information about adult participation in education and training programs and to assist in defining community needs.
- ❖ In federal systems, all levels of government must jointly collaborate to manage and operate a national adult education and lifelong learning system. Responsibilities must be clearly defined.
- ❖ The private sector must become an integral part of any adult education and lifelong learning system and governments must provide incentives for them to actively participate.
- ❖ National standards must be established and recognized by all participating jurisdictions.
- ❖ The adult education and lifelong learning system must address both the economic and social needs of its citizens.
- ❖ The key characteristics of an effective adult education and lifelong learning system are: flexibility, employability, decentralization, and deregulation.
- ❖ Adult learning policies and programs must be given the same status as tertiary or public school education and support for the adult education and lifelong learning system must be treated as separate unique issue from their pedagogical cousins.

- ❖ Adult education and lifelong learning systems have evolved to community-based delivery models. Any future model of adult education and lifelong learning must be founded in the communities it serves.
- ❖ Informal or experiential learning is not given much support in most national adult education and lifelong learning systems even though nation states espouse the vision, mission and lifelong learning goals produced by international organizations such as the OECD and EU. Future models of adult education and lifelong learning must recognize the potential of informal or experiential learning.
- ❖ Creation of an adult education and lifelong learning policy framework and system must be done in a systematic and planned manner.
- ❖ A number of guidelines exist to support the development of an adult education and lifelong learning policy framework. A common set of principles should be created to guide the creation of a national adult education and lifelong learning system.

## GUIDELINES FOR THE CREATION OF A PAN-CANADIAN POLICY FRAMEWORK

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### OVERVIEW

The Council of Ministers of Education, Canada is exploring the potential of creating a Pan-Canadian Adult Education and Lifelong Learning Policy Framework. A Pan-Canadian framework will guide the development, delivery and management of adult learning experiences to Canadian citizens in manner that supports their cultural, economic, social, language, democratic and educational needs and will help move Canada towards a culture that embraces lifelong learning.

It is hoped that the contents of this research report will guide the creation of a policy framework that will assist all jurisdictions in their pursuit of a Pan-Canadian framework. This section describes the results of the research presented in previous chapters and attempts to place the results in a Canadian context.

### PROPOSED DEFINITIONS

Research has shown that governments need to create a set of unifying definitions that will provide a common starting point for discussion and to support legislation and policy development. At present, there is no single definition that is used by the federal government, provinces or territories. Each has their own interpretation of adult learning, adult education and lifelong learning and internally the definitions and their interpretation will often vary from department to department.

The researchers have crafted a set of proposed definitions founded in the definitions of others and as described in the section on terminology. These definitions reflect the realities of the Canadian experience and have been written in a way that will support the creation of legislation and policy. Below are the three foundational definitions that should be used to guide the creation of a Pan-Canadian policy framework.

#### **Lifelong Learning**

*The development of human potential through a continuously supportive process which stimulates and empowers Canadian citizens of all ages to acquire all the knowledge, values, skills, and understanding they will require throughout their lifetimes as individuals, citizens and workers.*

**Impact:** The potential impact of this definition on legislation and policy is:

- ❖ Lifelong learning must not be seen as just an adult issue, it must begin in childhood where lifelong learning skills and attitudes are developed.
- ❖ Processes must be created to identify, capture and support lifelong learning experiences, be they in the workplace, at home or within the community.
- ❖ Lifelong learning policies must embrace the creation of informal or experiential opportunities that benefit all citizens.

### **Adult Learning**

*Adult learning is the process or result of adults gaining knowledge and expertise through practice, instruction, or experience. Adult learning may be intentional or non-intentional; it may take place at home, in educational institutions, at work, or in the community.*

**Impact:** The potential impact of this definition on legislation and policy is:

- ❖ Research must be supported to capture the types and promising practices of adult learning.
- ❖ Infrastructure must be established to ensure that citizens everywhere can access learning experiences that are of interest to them.
- ❖ The design and delivery of quality products using the most effective adult learning strategies, procedures, methods and media must be encouraged and financially supported.

### **Adult Education**

*Adult education refers to all sustained educational activities beyond initial education at any level, whether offered for credit, not for credit, or occurring experientially, which are undertaken by all of those defined as adults in Canadian society.*

**Impact:** The potential impact of this definition on legislation and policy is:

- ❖ Funding must be provided to all forms of adult education including for credit, not for credit and experiential learning experiences.
- ❖ A common definition of what constitutes an “adult” must be agreed upon by all jurisdictions.
- ❖ The ability for all Canadians to actively participate in an adult education system, anywhere, any time, must be supported.

In the original definition of adult education described in the definitions section of this report there are three categories of education: Formal, Non-Formal, and Informal. Although the literature extensively uses these three terms, it was found that they are often used in different ways and sometimes conflict with one another depending on the author.

When developing adult education policy the authors want to avoid potential confusion and employ terms that embrace the concepts of formal, non-formal and informal learning as described in the literature, but which indicates clearly to readers what is meant by these descriptors. It is therefore recommended that the three types of Canadian adult education and lifelong learning experiences be titled as: Certified, Not Certified, or Experiential; and that these terms employ definitions similar to the original three. The proposed Pan-Canadian definitions would be:

***Certified*** - Structured and organized training, education or professional development experiences that are provided through an educational institution, in the workplace, or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.

**Not Certified** - Organized or systematic educational, training or professional development activities carried out in Canadian society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.

**Experiential** - The process of acquiring knowledge, skills, and values from daily experiences at home, in the community, or at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that Canadians may seek out these experiences to enhance their individual or collective learning.

This simple terminology change (from formal, non-formal and informal to certified, not certified and experiential) will allow individuals taking the same course to be classified in different ways. For example, three individuals taking a university course in accounting could be doing so for three different reasons. One person could be completing the course to support his or her CGA certification (Certified), another may be taking it because he or she works as a bookkeeper and feel it may prepare him/her in better support his or her clients (Not Certified) and a third person may be taking the course because he or she has an interest in accounting but may never use the knowledge or skill gained in any work environment (Experiential).

Finally we must define the term learning, since it is used extensively throughout the three foundational definitions.

*Whether certified, not certified, or experiential; learning is the modification of individual or group behaviour or beliefs through the process of acquiring knowledge, skills, values, and attitudes.*

## GUIDING PRINCIPLES

The research has identified a number of countries and organizations that have articulated guiding principles and strategies for the development of adult education and lifelong learning policies. Based on a review of the literature it is recommended that the following principles be used to guide the creation of an adult education and lifelong learning system that would support all Canadians.

- ❖ **Community Focused and Driven** – The Canadian adult education and lifelong learning system must be driven by the needs of regional, cultural, social or economic communities. Each community must have the ability to tailor its education and lifelong learning programs to respond the needs of its members. Needs should flow up, support should flow down.
- ❖ **Founded on Strong Partnerships** – All levels of government, the private sector, not for profit organizations and volunteer agencies must establish partnerships to jointly address the needs of their various communities. Funding formulas, tax incentives, communications and idea sharing methods and other initiatives must be established to encourage active and continuous participation by all partners.
- ❖ **Recognition and Portability Across Boundaries** – A process must be established to allow the recognition and portability of professional and personal competencies across territorial and provincial boundaries. The principle of recognition and portability must be recognized by the various certifying bodies that exist within Canada.



- ❖ **Strong Learner Support** – A wide variety of services must be established to support the learners through their lifelong learning journey. These may include: academic and lifelong learning counseling; ready access to information and programs; financial support; PLAR assessments; and competency tracking.
- ❖ **Program Flexibility** – Programs must be developed in a way that actively encourages learners to participate and to continue to participate throughout their lifetimes. Open entrance standards, flexible delivery methods, flexible schedules and more time for completion are needed to ensure program flexibility.
- ❖ **Quality Programming** – Adult education and lifelong learning programs must be instructionally sound, motivating and well designed.
- ❖ **Founded on a National Infrastructure** – To ensure that everyone has an equal opportunity to participate in the adult education and lifelong learning system, no matter his/her location or time of study; traditional and ICT infrastructure must be provided to all communities to ensure that they have the tools needed to address their community needs.

## THE POLICY FRAMEWORK

In the past many of Canada's adult education programs have been targeted at EI support, back to work, literacy, basic adult education and education to work programs. In most cases these would be considered economy-driven programs. It is proposed that the authors of the future Pan Canadian policy framework must continue to address the economic needs of our citizens, but they should also consider the social and personal needs of Canadians and ensure federal, provincial and territorial policies and programs are created to address these needs as well.

To assist policy makers in the creation of a framework the following policy development model is offered. The model, as illustrated in Table 4, is based on the definitions and typology described earlier in this research report. The model depicts 12 quadrants based on the four categories and three major types of adult learning that are reflected in the literature. Each quadrant can have its own policies and programs and each adult learning category (Global, Social, Economic, Community and Personal) can be delivered in either a certified, not certified or experiential manner depending on the target audience.

**Table 4: Model of Adult Education, Adult Learning and Lifelong Learning**

	<b>CERTIFIED</b>	<b>NOT CERTIFIED</b>	<b>EXPERIENTIAL</b>
<b>GLOBAL</b>	Policy and Programs	Policy and Programs	Policy and Programs
<b>ECONOMIC</b>	Policy and Programs	Policy and Programs	Policy and Programs
<b>SOCIAL</b>	Policy and Programs	Policy and Programs	Policy and Programs
<b>PERSONAL DEVELOPMENT</b>	Policy and Programs	Policy and Programs	Policy and Programs

The three types of adult education and lifelong learning; certified, not certified, and experiential; were defined earlier in this section. Below are the definitions for the four categories of adult education, adult learning and lifelong learning described in the model. These categories are based on the literature described earlier in the terminology and typology section of this report.

### **Global**

The typology category “Adult Education in the Knowledge Age” states “adult education is to ensure that adults are able to work and compete in the global economy, through the development of skills and knowledge which are of value to organizations and the marketplace. The goal is economic sustainability through perpetual learning.” To achieve this in a Canadian context, policy and program development must support both the international and national economic needs of Canada. Although these needs are complimentary in some areas, they can be treated as two separate areas of interest when creating policy. It is therefore recommended that there be two categories supporting economic development, each with its own unique demands: Global and Economic.

The Global category can be described as “learning experiences that impact a citizen’s ability to exist in the global market place.”

### **Economic**

The second economic policy category should be used to address issues of employability, vocational training and workplace related training. Thus the Economic category will provide policies and programs to support “learning experiences that prepare a citizen to perform a specific job or to be part of an occupational group.”

### **Social**

The Social category embraces the concepts presented in the “Adult Education for Civil Society” typology description. This category will address policies to support “learning experiences that enhance a citizen’s ability to be a valued, active and contributing member of his/her society and local communities.”

### **Personal Development**

The fourth category “Personal Development” incorporates the ideas of “Adult Education and Living Longer and Living Wider”. This category will address policies and programs that support “learning experiences that are pursued by individuals ‘because they need to know or want to know’. Citizens are exercising the ideal of learning for living.”

In the earlier discussion of typology we described “Culture, Media Information and Communication Technologies (ICTs)” as a fourth component of the typology for an adult education framework. When creating policy it is believed that the use of ICTs is an essential consideration for all policies and programs and that the creation of an ICT infrastructure that supports the growth of an adult education and lifelong learning culture and media is essential to support all four of the proposed Canadian categories of adult education. Thus it is assumed that ICT is a key component of them all.

**Table 5: Government Commitment to Adult Education**

	<b>CERTIFIED</b>	<b>NOT CERTIFIED</b>	<b>EXPERIENTIAL</b>
<b>GLOBAL</b>			
<b>ECONOMIC</b>			
<b>SOCIAL</b>			
<b>PERSONAL DEVELOPMENT</b>			

Governments have traditionally provided policy direction, infrastructure support, and programs and/or funds to support the formal adult education environment. In addition, they have provided program support, funds and/or corporate tax incentives to support the design and delivery of the “Not Certified” learning experiences such as training in the workplace and apprenticeship training. The shaded area in Table 5 conceptually demonstrates where the majority of Canadian government policy, support and funds have been traditionally targeted. As the Table 5 illustrates via darker shading the majority of government support has been targeted at the economic needs of their citizens. There have been few policies or programs targeted for the “Personal Development” and or “Experiential” needs of the Canadian population.

This lack of government commitment to the experiential learning environment and to the social learning needs and personal interests of our citizens has occurred because models, tools and procedures to capture and track this type of knowledge and skills are very rudimentary. Currently governments and the private sector are focused on immediate outcomes and the need to measure the success of these outcomes. Often these outcomes have global or economic objectives. By its very nature experiential learning does not easily fit into the policy directed and program driven environment of the current adult education system.

Table 6 contains a description of a proposed policy framework based on the Model of Adult Education, Adult Learning and Lifelong Learning and the definitions described earlier. It provides suggestions as to the type of agencies that should be involved in each part of the model and provides examples of programs that could fit into each quadrant in the model. The aim is to provide guidance to authors of a Pan-Canadian adult education and lifelong learning system and to provide examples of potential funding/responsible agencies and the types of programs that could be supported. This table should not be considered a complete model, but an illustration of a potential model to guide policy development

Table 6: Description of an Adult Education and Lifelong Learning Model

CATEGORIES OF ADULT EDUCATION				TYPES OF ADULT EDUCATION		
				CERTIFIED	NOT CERTIFIED	EXPERIENTIAL
<p align="center"><b>Descriptions</b> (Bracketed statements reflect relationship to typology and definitions)</p>				Structured and organized training, education or professional development experiences that are provided through an educational institution, in the workplace, or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.	Organized or systematic educational, training or professional development activities carried out in Canadian society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.	The process of acquiring knowledge, skills, and values from daily experiences at home, in the community, or at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that Canadians may seek out these experiences to enhance their individual or collective learning.
CULTURE, MEDIA & ICTs	<b>GLOBAL</b>  (Living and Working in the Knowledge Age – Part 1)	Learning experiences that impact a citizen's ability to exist in the global market place.	Responsible Agencies	<ul style="list-style-type: none"> <li>❖ International Agencies and Organizations</li> <li>❖ Government</li> <li>❖ Universities and Colleges</li> </ul>	<ul style="list-style-type: none"> <li>❖ International Agencies and Organizations</li> <li>❖ Government</li> <li>❖ Non-Government Agencies</li> <li>❖ Corporate Training Organizations</li> </ul>	<ul style="list-style-type: none"> <li>❖ International Agencies and Organizations</li> <li>❖ Government</li> <li>❖ Non-Government Agencies</li> </ul>
			Program Examples	<ul style="list-style-type: none"> <li>❖ International Business Programs</li> <li>❖ Certificates, Diplomas, Degrees offered by International Organizations (e.g. UN Staff College)</li> </ul>	<ul style="list-style-type: none"> <li>❖ Multi-Language Programs</li> <li>❖ Multi-National Training Programs</li> <li>❖ Peacekeeping, Peacemaking</li> <li>❖ International Conflict Resolution</li> </ul>	<ul style="list-style-type: none"> <li>❖ Multi-Cultural Awareness Programs</li> <li>❖ International Conferences and Workshops</li> <li>❖ Participation in International Projects</li> </ul>

CATEGORIES OF ADULT EDUCATION			TYPES OF ADULT EDUCATION			
			CERTIFIED	NOT CERTIFIED	EXPERIENTIAL	
<p align="center"><b>Descriptions</b> (Bracketed statements reflect relationship to typology and definitions)</p>			Structured and organized training, education or professional development experiences that are provided through an educational institution, in the workplace, or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.	Organized or systematic educational, training or professional development activities carried out in Canadian society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.	The process of acquiring knowledge, skills, and values from daily experiences at home, in the community, or at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that Canadians may seek out these experiences to enhance their individual or collective learning.	
CULTURE, MEDIA & ICTs	<p><b>ECONOMIC</b>  (Living and Working in the Knowledge Age – Part 2)</p>	Learning experiences that prepare a citizen to perform a specific job or to be part of an occupational group.	Responsible Agencies	<ul style="list-style-type: none"> <li>❖ Universities</li> <li>❖ Community Colleges</li> <li>❖ Private Post-Secondary Institutions</li> </ul>	<ul style="list-style-type: none"> <li>❖ Corporate Training Organizations</li> <li>❖ Military and Government Training Organizations</li> <li>❖ Private Sector Certifying Agencies (e.g. PMI)</li> <li>❖ Unions and Labour Associations</li> </ul>	<ul style="list-style-type: none"> <li>❖ Corporate Training Organizations</li> <li>❖ Military and Government Training Organizations</li> <li>❖ Professional Associations</li> <li>❖ Unions and Labour Associations</li> </ul>
			Program Examples	<ul style="list-style-type: none"> <li>❖ Post-Secondary Certificates, Diplomas and Degrees</li> <li>❖ Formal and Continuous Professional Certification</li> </ul>	<ul style="list-style-type: none"> <li>❖ Job Specific Training</li> <li>❖ Organization Specific Career and Executive Development Programs</li> </ul>	<ul style="list-style-type: none"> <li>❖ Orientation Training</li> <li>❖ Conference, seminar or workshop attendance</li> <li>❖ Health and Safety Awareness Programs</li> <li>❖ Harassment in the Workplace Programs</li> <li>❖ Environmental Awareness Training</li> </ul>

CATEGORIES OF ADULT EDUCATION			TYPES OF ADULT EDUCATION		
			CERTIFIED	NOT CERTIFIED	EXPERIENTIAL
<p align="center"><b>Descriptions</b> (Bracketed statements reflect relationship to typology and definitions)</p>			Structured and organized training, education or professional development experiences that are provided through an educational institution, in the workplace, or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.	Organized or systematic educational, training or professional development activities carried out in Canadian society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.	The process of acquiring knowledge, skills, and values from daily experiences at home, in the community, or at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that Canadians may seek out these experiences to enhance their individual or collective learning.
CULTURE, MEDIA & ICTs	<p><b>SOCIAL</b> <b>(The Civil Society)</b></p>	<p>Learning experiences that enhance a citizen's ability to be a valued, active and contributing member of his/her society and local communities.</p>	<p>Responsible Agencies</p> <ul style="list-style-type: none"> <li>❖ Government</li> <li>❖ Universities and Colleges</li> <li>❖ Local School Boards</li> <li>❖ Non-Government Agencies</li> <li>❖ Government Approved Private Training Institutes</li> <li>❖ Government Approved Certifying Bodies</li> </ul>	<ul style="list-style-type: none"> <li>❖ Government</li> <li>❖ Non-Government Agencies</li> <li>❖ Local Community Agencies</li> <li>❖ Local School Boards</li> <li>❖ Professional Associations</li> </ul>	<ul style="list-style-type: none"> <li>❖ Non-Government Agencies</li> <li>❖ Local Community Organizations</li> <li>❖ Corporate Training Organizations</li> <li>❖ Professional Associations</li> </ul>
			<p>Program Examples</p> <ul style="list-style-type: none"> <li>❖ Second Language Programs</li> <li>❖ Adult Literary Programs</li> <li>❖ Adult Basic Education</li> <li>❖ First Nations Awareness Training</li> </ul>	<ul style="list-style-type: none"> <li>❖ Citizenship Programs for new immigrants</li> <li>❖ Drug Awareness Programs</li> </ul>	<ul style="list-style-type: none"> <li>❖ Multi-Cultural Awareness Programs</li> <li>❖ Gender Awareness Programs</li> <li>❖ General Interest Courses offered through recreation departments.</li> <li>❖ Community building activities and learning experiences</li> <li>❖ Conference, seminar or workshop attendance</li> </ul>

CATEGORIES OF ADULT EDUCATION			TYPES OF ADULT EDUCATION		
			CERTIFIED	NOT CERTIFIED	EXPERIENTIAL
<p align="center"><b>Descriptions</b> (Bracketed statements reflect relationship to typology and definitions)</p>			<p>Structured and organized training, education or professional development experiences that are provided through an educational institution, in the workplace, or by a professional accrediting body. It is institution-bound and time-bound and results in formal certification by some formal institution, professional body or sanctioned certifying agency.</p>	<p>Organized or systematic educational, training or professional development activities carried out in Canadian society by a variety of structured educational institutions, community organizations, or training agencies, and which is frequently more flexible in meeting the needs of specific learners. This type of learning/education does not result in formal certification.</p>	<p>The process of acquiring knowledge, skills, and values from daily experiences at home, in the community, or at work. The process may appear unorganized and unsystematic, but it is not necessarily unintentional in that Canadians may seek out these experiences to enhance their individual or collective learning.</p>
<p><b>PERSONAL DEVELOPMENT</b>  (Living Longer and Learning Wider)</p>	<p>Learning experiences that are pursued by individuals “because they need to know or want to know”. Citizens are exercising the ideal of learning for living.</p>	<p>Responsible Agencies</p>	<ul style="list-style-type: none"> <li>❖ School Boards</li> <li>❖ Universities</li> <li>❖ Community Colleges</li> <li>❖ Private Post-Secondary Institutions</li> </ul>	<ul style="list-style-type: none"> <li>❖ Local Government</li> <li>❖ Local School Boards</li> <li>❖ Local Community Agencies</li> <li>❖ Non-Government Agencies</li> <li>❖ Professional Associations</li> </ul>	<ul style="list-style-type: none"> <li>❖ Local Community Agencies</li> <li>❖ Non-Government Agencies</li> <li>❖ Professional Associations</li> </ul>
		<p>Program Examples</p>	<ul style="list-style-type: none"> <li>❖ Individual courses or programs of interest to the individual not necessarily seeking formal certification</li> </ul>	<ul style="list-style-type: none"> <li>❖ Night School courses offered by local school board.</li> </ul>	<ul style="list-style-type: none"> <li>❖ General Interest Courses offered through recreation departments.</li> <li>❖ Conference, seminar or workshop attendance</li> </ul>

## SUPPORTING SYSTEMS

An adult education and lifelong learning model requires a number of support systems that are either part of the model or should interface with the model. The literature has defined a number of key systems that need to be considered when developing a Pan-Canadian Policy Framework. These include:

- ❖ **Competency Management** – There is a need to define and track the global, social, economic, community and personnel competencies based on Canadian adult learner needs. The competency management system must support portability of competencies across multiple jurisdictions.
- ❖ **Prior Learning Assessment/Certification** – A process must exist that allows adult learners to challenge existing competencies based on prior certified or not certified learning or through experiential learning opportunities. In those areas or sectors that require formal certification by a certifying body, the system must allow professionals to quickly match their current qualifications with those defined by the certifying body.
- ❖ **Distance Learning** – A distance learning environment and supporting infrastructure must be provided to deliver programs to adult learners, anywhere, anytime within Canada. The adult education and lifelong learning distributed learning environment should allow all partners (government, private sector, non-profit, etc) to publish and deliver courseware/learnware using the same or complimentary systems. The use of e-Portfolios should be supported.
- ❖ **Information/Knowledge Management** – The ability to find information, research areas of interest and share knowledge should be available to all adult learners. The system must provide all of the information and tools necessary for the adult learner to manage, record and track his/her learning experiences. This may be in the form of a knowledge management portal, or it may be part of a larger ICT system that includes all of the supporting systems necessary to provide an electronic adult education and lifelong learning system backbone.
- ❖ **Program Design and Production** – Guidance on program design and production should be provided to public or private agencies or individuals who plan and design adult education and lifelong learning experiences. The process must result in motivating, highly interactive, quality learning experiences that are founded in adult learning theory best practices and sound instructional strategies.
- ❖ **Professional Development** – Adult educators, trainers, lifelong facilitators, online instructors, and adult coaches and mentors should be provided access to quality information and instruction in the best practices of program design and delivery. Development of standards for professionals supporting the adult education and lifelong learning environment should be developed and tied to specific programs.
- ❖ **Quality Control** – A process for assessing the ability of the system to deliver quality learning experiences and the ability to measure the impact of adult education and lifelong programs based on the desired outcomes is essential if the system is to support continuous improvement. It in effect becomes the feedback loop within the model.

**Research Support** - Research into adult education, lifelong learning, ICT systems and other related topics required to support model growth and policy development is required to ensure that the processes, procedures and tools reflect the best practices of the adult learning community.



Depending on the technologies and methods used to deliver and support these systems, some may be combined into one delivery and management environment or the creation of a Pan-Canadian adult learning management system may be required. Ideally there should be one system that supports all jurisdictions. Any citizen of Canada should be able to register in the system and navigate the various components, tools and programs provided by all participants.

## **THE ROLE OF GOVERNMENT**

As the Pan-Canadian Policy Framework evolves the role of the different levels of government needs to be clearly defined and negotiated. Governments should ideally create legislation and policy that embraces the guiding principles described earlier in this section. It is hoped that all levels of government cooperate in the initial development of the adult education and lifelong learning system, but as the system matures responsibility must evolve to the communities most impacted by the system. Governments must determine how to provide the support needed to grow and support the system; and the community of learners must define and respond to the adult learning needs.

Governments need to strive to create partnerships with all those impacted by the adult education and lifelong learning system. They should provide incentives for all potential partners to actively support and contribute to the system.

Governments need to provide guidance on competencies and standards that have a national, provincial or territorial impact. They should ideally ensure that systems are in place to support the requirements for recognition and portability of competencies. They should ensure that all community needs (including minority and First Nation needs) are addressed in the lifelong learning system.

The federal government should support the creation of and where appropriate provide support for a national ICT infrastructure. The provincial and territorial governments should work with their community partners to determine what policies, programs and funding mechanisms are needed to support their specific adult education and lifelong learning needs. Quality control methods need to be established that can provide the data needed to measure quality.

Governments at levels need to coordinate their efforts to move toward a Pan-Canadian adult education and lifelong learning system. Duplication of effort needs to be eliminated. Some form of federal, provincial, territorial, community-based collaborative environment must be established and supported.

## **SUMMARY**

This section has provided some guidance on what should be considered when developing a Pan-Canadian Policy Framework. The creation of the framework will require the cooperation of all levels of government. The private sector, community based organizations and other stakeholders must be actively engaged in the process. Roles and responsibilities for the planning, implementation, operation and management of the adult education and lifelong learning system must be clearly defined.

## CONCLUSION

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It is hoped this report will provide all levels of government with the foundation upon which to create a Pan-Canadian Policy Framework. The report reflects clear definitions, provides a unified model of adult education, adult learning and lifelong learning, and provides recommended guidelines and principles for the creation of legislation and supporting policy.

As the different levels of government move forward, it is recommended that they consider the issues and potential barriers raised by the provinces and territories in their response to the adult education survey. These issues touched upon:

- ❖ A need for a unified definition and model of adult education.
- ❖ Support for legislation and policies that meet the unique needs of different Canadian constituents.
- ❖ A move towards a collaborative decision making process.
- ❖ The need for an appropriate and shared funding strategy to meet the defined needs.
- ❖ The requirement for an expanded focus for adult education, adult learning and lifelong learning.
- ❖ Recognition of geographical, cultural and language differences.
- ❖ A move towards a Pan-Canadian approach to adult education that removes barriers of employment and portability.

The recommended next step for CMEC is to review this report and begin the process of building a Pan-Canada policy framework that can satisfy all jurisdictions. The process should ideally involve a wide array of stakeholders including representatives from government, the private sector, unions, professional bodies, non-government organizations/not-for profit agencies, community associations and other parties that have an interest in supporting an adult education and lifelong learning agenda.

The policy framework should hopefully be crafted based on the seven guiding principles described in the report:

- ❖ Community Focused and Driven.
- ❖ Founded on Strong Partnerships.
- ❖ Recognition and Portability Across Boundaries.
- ❖ Strong Learner Support.
- ❖ Program Flexibility.
- ❖ Quality Programming.
- ❖ Founded on a National Infrastructure.

Finally the authors of the policy framework should attempt to address both the economic and social needs of the Canadian population are addressed and that adult education and lifelong learning policies and programs are developed and delivered that support all forms of adult learning experiences including Certified (Formal), Not Certified (Non Formal) and Experiential (Informal), any time and anywhere in Canada. The final policy framework must incorporate the implementation of the support systems identified in this report and needed by all Canadians to maximize their potential in reaching their lifewide personal and professional learning goals.

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## APPENDIX A

### LITERATURE REVIEW INCLUSION/EXCLUSION CRITERIA

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Note: An initial review of all potential titles/abstracts should be completed and those references that match the following criteria should be considered further.

#### Journal articles

- The article is published in a refereed journal.
- The article has been published after 01/2000.
- The article is from a credible source (journal).
- The article is appropriate, given the audience.
- The article exhibits timeliness.
- The article is appropriate in scope.

Plus one of:

- The article reflects empirical research.
- The article reflects practitioner action research and/or development.

#### Books

- The book has been published after 01/2000.
- The book is published by a recognized publisher in adult education.
- Author credentials are included.
- The scope of the book is applicable to the study.

#### Policy Papers/Institutional Documents

- The policy document can be attributed to the institution/organization.
- The policy document can be released to the public domain.
- The policy document is applicable to the study.
- The policy document is appropriate in scope.
- The document has been developed after 01/1995.

#### Conference Presentations/Papers

- The presentation/paper has been delivered after 01/2000.
- Presenter credentials are included.
- The presentation/paper is from a credible source (conference).
- The presentation/paper is appropriate, given the audience.
- The presentation/paper exhibits timeliness.
- The presentation/paper is appropriate in scope.

Plus one of:

- The presentation/paper reflects empirical research.
- The presentation/paper reflects practitioner action research and/or development.

## APPENDIX B

### SEARCH TERMS AND CATEGORIES

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The following basic search terms were investigated:

- ❖ Adult Education
- ❖ Androgogy
- ❖ Adult Learning
- ❖ Adult Literacy
- ❖ Continuing Education
- ❖ Lifelong Learning
- ❖ Continuous Learning
- ❖ Professional Development
- ❖
- ❖ Across each of the above basic search terms, the following variations were also investigated:
- ❖
- ❖ Theory
- ❖ Research
- ❖ Learning Theory
- ❖ Models
- ❖ Terms
- ❖ Typology
- ❖ Terminology
- ❖ Framework
- ❖ Formal
- ❖ Non-Formal
- ❖ Informal
- ❖ Best Practices
- ❖ Lessons Learned
- ❖ Future
- ❖ Implementation
- ❖ Barriers
- ❖ Leaders
- ❖ Policy

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- ❖ Government Policy
- ❖ Canadian Government Policy
- ❖ International Policy
- ❖ National Policy
- ❖ White Papers

## APPENDIX C

### LIST OF JOURNALS REVIEWED DURING STUDY

Journals Searched A - Z (Titles and Abstracts) 2000-2004

Action Learning	Journal of Access and Credit Studies
Adult Basic Education	Journal of Adult and Continuing Education
Adult Education and Development	Journal of Adult Education
Adult Education and Training	Journal of College Reading and Learning
Adult Education Quarterly	Journal of Comparative Education
Adult Learning	Journal of Continuing Higher Education
Adults Learning	Journal of Education and Work
American Educational Research Journal	Journal of Educational Policy
American Journal of Distance Education	Journal of Extension
Assessment and Evaluation in Higher Education	Journal of Lifelong Learning
Australian Journal of Adult Learning	Journal of Transformative Education: Research, Theory and Practice
Canadian Journal for the Study of Adult Education	Journal of Workplace Learning
Canadian Journal of Higher Education	Lifelong Learning in Europe
Canadian Journal of University Continuing Education	New Directions for Adult and Continuing Education
Career Planning and Adult Development	New Horizons in Adult Education
Continuing Higher Education Review	New Zealand Journal of Adult Learning
Convergence	Nursing Administration Quarterly
Education and Ageing	Perspectives
Education and Training	Practica
Education Canada	Review of Educational Research
Education Journal	Review of Higher Education
Educational Horizons	Studies in Continuing Education
Educational Researcher	Studies in the Education of Adults
European Journal of Education	T.H.E. Journal
Globalisation, Societies and Education	Training and Development
Human Resources Development Review	Vertex – The Online Journal of Adult and Workforce Education
Industry and Higher Education	
International Journal of Educational Development	
International Journal of Educational Policy, Research and Practice	
International Journal of Lifelong Education	
International Journal of Public Administration	
International Journal of Training and Development	
International Journal of University Continuing Education	
International Journal on E-Learning	
International Review of Education	



## APPENDIX D

### LIST OF STUDY STAKEHOLDERS

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The following adult educators have agreed to serve as stakeholders for the CMEC study.

Gary McNeely  
Brandon University  
Prior Learning Assessment Expertise

Dwayne Hodgson  
Canadian Programs Director – Global Learning Partners  
International Background and Expertise

Dr. Patricia Cranton  
St. Francis Xavier University  
General Expertise + Adult Learning Theory Expertise

David Braun  
SaskPower Training  
Apprenticeship and Workforce Training Expertise

Lois Morin  
Manitoba Advance Education and Training  
Government Sector Training + Prior Learning Assessment Expertise

Dr. Ron Faris  
President: Golden Horizon Ventures  
Lifelong Learning Expertise + Aboriginal/Community Learning Expertise

Dr. Budd Hall  
Dean of Education: University of Victoria  
General Expertise + International/Globalisation Expertise

Derek Hicks  
College of the North Atlantic + Past President of Nfld & Labrador Association of Adult  
Education  
General Expertise + ABE/Literacy Expertise

## APPENDIX E

### PROVINCIAL/TERRITORIAL ADULT EDUCATION SURVEY

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#### OVERVIEW

Innovative Training Solutions Inc. has been contracted by the Council of Minister of Education, Canada to undertake a review of current adult education literature and promising adult education practices focused on identifying:

1. Existing comprehensive policy frameworks both nationally and internationally as well as the stage of their development.
2. Key concerns, challenges and barriers to implementation being faced by those frameworks.
3. Initiatives that have developed or are seeking to develop principles or guidelines for improving policy and program practices.
4. Leaders and organizations working or supporting the development of comprehensive frameworks.

This current survey is intended to build on and refine the work and recommendations of the *Report on Adult Education Survey* conducted in 2003 by the Postsecondary Expectations Consortium.

The study will employ a variety of techniques to capture the relevant literature and promising practices, including a brief survey of current federal, provincial and territorial adult education legislation, policies and programs. This will include a survey and telephone interview with representatives of the provincial and territorial adult education coordinators.

#### INSTRUCTIONS

This survey consists of ten open-ended questions that focus on gathering background data on adult education programs (current and future) within each province or territory. You are asked to respond as completely as possible to each of the ten questions. You are encouraged to provide electronic copies of all legislation, policies or program descriptions referenced in your response to the survey questions.

Forward your completed survey response to Dr. Roger Powley, the Policy Researcher via email at [rpowley@innovativetraining.ca](mailto:rpowley@innovativetraining.ca). Any materials that cannot be sent electronically can be mailed to the address identified at the end of this survey document.

As you work this survey feel free to call Dr. Powley to seek further clarification. He can be reached at 250-881-1923.

Once the survey information has been reviewed and synthesized, the research team will follow up with a one-hour individual telephone interview with each provincial and territorial representative sometime in February. The timing and content of the telephone interviews will be the subject of another email in the New Year.

#### CONFIDENTIALITY

The information provided in response to this survey will be treated as government/ CMEC confidential and will only be reflected in the draft and final reports provided to CMEC in support of this contract.

**DUE DATE**

Our mandate requires that we deliver a draft report to CMEC on or before 31 January 2005, therefore it is requested that you provide your response to the questions below on or before 21 January 2005. This will give the research team one week to review and synthesize the information provided and include it into the draft report.

Follow-on one-on-one interviews will be scheduled for February 2005 after CMEC has reviewed some of the initial findings of the study.

**CMEC POLICY RESEARCHER POINT OF CONTACT**

For further information about the study contact:

Roger Powley, CD PhD  
Innovative Training Solutions Inc.  
4621 Falaise Drive  
Victoria, BC V8Y 2S8  
Canada  
(250) 881-1923  
[rpowley@innovativetraining.ca](mailto:rpowley@innovativetraining.ca)

**BACKGROUND INFORMATION**

Province/Territory \_\_\_\_\_

Name of Respondent(s) \_\_\_\_\_

Job Title(s) \_\_\_\_\_

Respondent(s) Phone Number(s) \_\_\_\_\_

Respondent(s) Email Address(es) \_\_\_\_\_

Department(s) Involved in  
Managing Adult Education \_\_\_\_\_

Briefly Describe the Role of Each  
Department in Managing Adult  
Education \_\_\_\_\_

## SURVEY QUESTIONS

1. How does your government define adult education?
2. Note: The 2003 Adult Education Survey provided definitions for Manitoba, Quebec, British Columbia and Newfoundland and Labrador. If these definitions have changed, please explain.
3. Does your government provide publicly sponsored programs that support adult education, based on the definition provided above? Please describe.
4. What legislation supports the programs described above?
5. Does your government have legislation or policies that encourage the private sector and NGOs to provide support to employees who participate in formal <sup>1</sup> and non-formal <sup>2</sup> adult education programs? If yes, please describe.
6. Does your government have legislation or policies that encourage the public to participate in informal <sup>3</sup> life-long learning programs that enhance an individual's well being?
7. Are there new or modified programs or policies that are being considered to enhance your government's adult education agenda? If yes, please describe.
8. What are the major barriers to the delivery and management of existing adult education programs and/or the creation of new adult education programs to better support the needs of your constituents?
9. What are the essential elements that guide your existing and/or future adult education policy framework?
10. What other issues should the research team consider when trying to identify the requirements for a pan-Canadian adult education framework?
11. What major references, studies, or other materials would you recommend that the team review as part of this research study?

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<sup>1</sup> **Formal** - Structured and organized training that is provided in an educational institution or at the workplace.

<sup>2</sup> **Non-Formal** - Any organized, systematic educational activity, carried on outside the framework of the formal system.

<sup>3</sup> **Informal** - Lifelong process of acquiring attitudes, values, skills and knowledge from daily experiences, educative influences and other resources.

## APPENDIX F

### FEDERAL GOVERNMENT ADULT EDUCATION SURVEY

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#### OVERVIEW

Innovative Training Solutions Inc. has been contracted by the Council of Minister of Education, Canada to undertake a review of current adult education literature and promising adult education practices focused on identifying:

- ❖ Existing comprehensive policy frameworks both nationally and internationally as well as the stage of their development.
- ❖ Key concerns, challenges and barriers to implementation being faced by those frameworks.
- ❖ Initiatives that have developed or are seeking to develop principles or guidelines for improving policy and program practices.
- ❖ Leaders and organizations working or supporting the development of comprehensive frameworks.

This current survey is intended to build on and refine the work and recommendations of the *Report on Adult Education Survey* conducted in 2003 by the Postsecondary Expectations Consortium.

The study will employ a variety of techniques to capture the relevant literature and promising practices, including a brief survey of current federal, provincial and territorial adult education legislation, policies and programs. This will include a survey and telephone interview with representatives of the provincial and territorial adult education coordinators.

#### INSTRUCTIONS

The federal government survey consists of eight open-ended questions that focus on gathering background data on adult education programs (current and future) that the government of Canada supports. Respondents are asked to respond as completely as possible to each of the eight questions. They are encouraged to provide electronic copies of any legislation, policies or program descriptions referenced in their response to the survey questions.

Forward your completed survey response to Dr. Roger Powley, the Policy Researcher via email at [rpowley@innovativetraining.ca](mailto:rpowley@innovativetraining.ca). Any materials that cannot be sent electronically can be mailed to the address identified at the end of this survey document.

As you work this survey feel free to call Dr. Powley to seek further clarification. He can be reached at 250-881-1923.

Once the survey information has been reviewed and synthesized, the research team will follow up with a one-hour individual telephone interview with each provincial and territorial representative sometime in February. The timing and content of the telephone interviews will be the subject of another email in the New Year.

**CONFIDENTIALITY**

The information provided in response to this survey will be treated as government/ CMEC confidential and will only be reflected in the draft and final reports provided to CMEC in support of this contract.

**DUE DATE**

Our mandate requires that we deliver a draft report to CMEC on or before 15 March 2005, therefore it is requested that you provide your response to the questions below on or before 15 February 2005. This will give the research team time to review and synthesize the information provided and include it into the draft report.

Follow-on one-on-one interviews will be scheduled for the end February 2005 after the research team has reviewed some of the initial findings of the study.

**CMEC POLICY RESEARCHER POINT OF CONTACT**

For further information about the study contact:

Roger Powley, CD PhD  
Innovative Training Solutions Inc.  
4621 Falaise Drive  
Victoria, BC V8Y 2S8  
Canada  
(250) 881-1923  
[rpowley@innovativetraining.ca](mailto:rpowley@innovativetraining.ca)

**BACKGROUND INFORMATION**

Federal Department \_\_\_\_\_

Name of Respondent(s) \_\_\_\_\_

Job Title(s) \_\_\_\_\_

Respondent(s) Phone Number(s) \_\_\_\_\_

Respondent(s) Email Address(es) \_\_\_\_\_

Department(s) Involved in  
Managing Adult  
Education/Vocational  
Training/Etc. \_\_\_\_\_

Briefly Describe the Role of Each  
Department in Managing Adult  
Education/Vocational  
Training/Etc. \_\_\_\_\_

## SURVEY QUESTIONS

1. How does the federal government define adult education?
2. What does the federal government feel is its role in the provision of adult education experiences and support to Canadians?
3. Does the federal government have legislation, policies or programs that:
  4. Encourage the public to participate in informal <sup>4</sup> life-long learning programs that enhance an individual's well being?
  5. Encourage the private sector and NGOs to provide support to employees who participate in formal <sup>5</sup> and non-formal <sup>6</sup> adult education programs?
6. Are there new or modified programs or policies that are being considered to enhance the federal government's adult education agenda? If yes, please describe.
7. What are the major barriers to the delivery and management of existing adult education programs and/or the creation of new adult education programs to better support the needs of Canadians?
8. What are the essential elements that guide existing and/or future adult education policy framework?
9. What other federal issues or concerns should the research team consider when trying to identify the requirements for a pan-Canadian adult education framework?
10. What major references, studies, or other materials would you recommend that the team review as part of this research study?

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<sup>4</sup> **Informal** - Lifelong process of acquiring attitudes, values, skills and knowledge from daily experiences, educative influences and other resources.

<sup>5</sup> **Formal** - Structured and organized training that is provided in an educational institution or at the workplace.

<sup>6</sup> **Non-Formal** - Any organized, systematic educational activity, carried on outside the framework of the formal system.