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Preface

Marko Radovan

The present publication contains the papers that were presented at the 7th Adult Education Colloquium called "Current Issues in Learning and Motivation of Adults" which was organised by the Slovenian Institute for Adult Education (SIAE), from 17th to 18th October 2003, in Ljubljana.

The publication provides an insight into two important areas in adult education: characteristics of adult learning and the nature of motivation for learning. Although much has been done to address these questions over the past decades, new issues, especially with the developments of new technologies for learning, are constantly arising. According to Merriam and Caffarella (1999) there are three main agents that influence the rise of adult learning in modern societies: demographics, the global economy and technology. Changing demographics is the reality of all western societies, and it is labelled as a transition from youth-oriented to an adult-oriented society (Merriam and Caffarella, 1999). Another demographic shift is traceable in the raising of educational level which is a major demographic predictor that influences participation in adult education. The last SIALS study showed that the most important predictor of participation is the level of initial education (OECD, 2000). It was significant for all countries which participated in the survey, that the rate of participation in adult learning was closely linked to formal education received in previous schooling. Societies undergoing such important changes in turn raise the demand for adult learning.

However, although the needs for learning and participation in adult education are rising, and lifelong learning has already become an integral part of life in many modern societies, this does not necessarily means that it is distributed proportionally. Not all adults have adequate skills for learning and/or are equally motivated to learn. In the adult education literature there is much evidence of how the lack of motivation hinders participation in adult education. There are an enormous number of studies that address the issues of why some adults participate in further education and others do not. Various answers are given to this question that goes both to external and to internal reasons for participation. In spite of the fact that motivation is a concept that is hard to grasp in just one theoretical model, all theorists agree that it is an essential ingredient of the decision-making process that results in engagement in learning. Accompanying motivation to learn, there are some other personal barriers that prevent adults from participation in learning. I will name just a

few of them which are most current, and are linked to the de-institutionalisation and individualisation of lifelong learning that emphasizes greater autonomy in learning. With greater autonomy of the learner, the ability to learn is gaining in importance and consequently creating a new divide between adult learners.

Organisation of this monograph

It should be noted that the scientific committee of the 7th Adult Education Colloquium reviewed all the presented articles before they were included in the book. The chapters are organised into four main sections, each dealing with the topics that were discussed at the conference. First six papers open this publication with more theoretical overviews of the topics of learning and motivation. Linden West starts with the emphasis on a biographical approach to research in adult learning and motivation that captures a person as a whole. His presentation was focused on biographical issues in adult learning. Peter Jarvis expands his model of adult learning and recognises an existential dimension of learning. He compares some well-established learning theories and analyzes their suitability from the adult learning point of view. The need for a more general, all-embracing learning theory was identified. Knud Illeris draws our attention to a different dimension of adult learning and makes a distinction between learning in adulthood and in youth. Marko Radovan stresses the importance of the holistic approach towards examining and facilitating motivation to learn in the classroom. Analyses of the issues which are emerging from recent research in the area of motivational research are also given. Jyri Manninen describes the importance of the images of education, and possibilities for educational institutions to promote educational programmes and motivate potential participants to enroll in education. The paper by Sabina Jelenc Krašovec is more focused on the teacher of adults. She explains the shift from teaching to learning, and examines the role of teacher in facilitating adult learning in detail.

Four chapters explore the ways of facilitating adult learning and motivation to learn. Milka Atanasova shares her views on the cognitive, social and metacognitive aspects of motivation. Barica Marentič Požarnik presents a model that connects learning orientation, motivation, learning styles and the role of the learning environment. Kristine Smalcel Pederson gives some demonstrations of the role of guidance activity in adult education and its impact on motivation of adults for learning. Monika Rehrl examines the value of self-directed learning for enhancing professional learning.

The third part examines another emerging theme in adult education: technology as a new tool for adult learning. Barry Sponder makes some points regarding the removing the barriers that sometimes hinder adults from using technology as a tool for learning. Guy

Arquembourg shows some practical examples of how new multimedia technology can be used in language education. Lea Bregar and Margerita Zagmajster stress the importance of web portals as an information source in supporting the development of education, and present the development of an e-learning portal in Slovenia. This part ends with description by Metka Uršič and colleagues of the development of a new learning programme for older adults.

The fourth part of the book deals with reports on research into adult learning and wider aspects of adult learning. Two papers are presented that describe research on Slovenian teachers' motivation for training (Bogomir Kovač, and Slavica Černoša). Jane Simmons gives a general insight into the nature and state-of-the-art of adult learning. It puts forward the view of lifelong learning as a process of production, providing skilled workers for the demands of the economy. Angela Ivančič presents her views on the close link-up between learning and active citizenship, Hans Gruber shows some aspects of motivation to learn among professional musicians, while Anthony P. Donajgrodzki presents the project that supports lone parents and carers in their work-related academic learning.

It is clear from the variety of the contributions in this book that the field of adult learning is very diverse and hard to embrace. Even so, I hope that this book will not only give some answers, but also raise some new questions regarding the theory and practice of adult learning. And that is exactly what our purpose was to achieve.

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PLENARY PAPERS

WHY PEOPLE LEARN: ADULT LEARNING IN A CHANGING WORLD

Linden West

Abstract

In this paper I explore why and how adults engage and progress in learning, in the sense, that is, of significant transformations in their understanding of the world, their place in it and their sense of self. What is it that enables some people to compose, however marginally, greater agency in their lives, even in the most oppressive of situations? We need to understand more of why such people, in Sean Courtney (1992) words, become 'life-spacers': better able to engage with new experience and compose their lives on more authentic terms while other people may remain stuck and resistant to learning, escaping into fundamentalism, perhaps, as a solution to their problems. A basic premise of the paper is that our understanding of adult learning has to be located within a wider understanding of a culture of profound change and uncertainty, in which lifelong learning, in the sense used in this paper, has become a kind of survival necessity.

Introduction

What Anthony Giddens (1999) has described as a runaway world may also, paradoxically, be providing many new opportunities for people to experiment with their identities, however precariously. Earlier forms of industrial and agrarian societies, for instance, provided social scripts, which individuals were expected to learn and live by, but contemporary societies are placing more responsibility on individuals to compose their own biographies. This is poignantly illustrated by the shift from the notion of the linear biographical career, at least for men – from schooling to work and then on into retirement – to a more unpredictable life course in which there may be many different careers, periods of unemployment as well as formal learning. It should be added, in this new world, that if people find change constantly choosing them, they are also choosing change. Many women, for instance, under the impact of feminism, have challenged traditional roles – of being midwives to others' desires - and insist on building lives on more of their own terms. This is the territory in which to locate the question as to why people learn, and what enables them to succeed: a space and time in which we are, like it or not, forced to make ourselves up, as we go along.
I want to ground a consideration of these issues in three case studies of adults learning. The cases chosen illuminate complex processes as to why people engage in learning, and what enables them to keep on keeping on in the task. The processes of motivation and progression in learning are seen through the eyes of the learners, rather than institutions or policy makers. 'Brenda' is an adult learner who lives in a community experiencing economic dislocations where many traditional industries have closed. She was using adult learning to reconstruct her life and sense of self. The other two cases are from a study of highly disaffected young mothers (aged 14-19) engaged in a community arts educational outreach project in a marginalized community in East London. 'Gina' and 'Shazir' were wrestling with crises of identity, like Brenda, while their stories provide a more holistic perspective on progression in learning, in comparison, that is, to the conventional linear metaphor of moving up the educational ladder, so beloved of policy makers.
My basic argument is that processes of adult learning, for many adults, are increasingly implicated in the struggle to build a biography and some greater sense of agency in a life. And that there are three essential elements required for success in the project: the first the availability of significant others, or good objects, in psychological terms: people who value us, give us a sense of legitimacy and enable us to take risks with who and what we are. Relationships of this kind can be at a personal level, with a new partner, or they can involve a teacher, mentor, guidance worker or counsellor. They provide a sense of stability, cohesion and or positive emotional reinforcement in a changing world. Significant others can exist at a symbolic level too – as a character in literature, for instance – with whom we identify and who becomes part of our inner psychological drama. The second element has

to do with the idea of learning as transitional space – provided in higher or adult education, therapy or more informal settings – in which we can take risks with our identities, without feeling too threatened or paralysed by anxiety. The third element – and each of these is intimately related – has to do with story and the psychological importance of developing a more extensive narrative repertoire.

Changing times

As indicated, processes of adult learning have to be located in a culture of perpetual change and frightening insecurity as well as new opportunity for self-experiment. Anthony Giddens (1999) uses the phrase globalisation to describe a number of interconnected economic, cultural, technological and political imperatives that are impacting on our lives, including intimate relationships in ways which make biographical learning, or what he terms the reflexive project of the self, a survival necessity. The new global economic order involves fund managers, banks, corporations as well as millions of individual investors, transferring massive sums of money from one part of the globe to another, at the flick of a switch. Traditional economies, and communities, can be destabilised overnight and traditional occupational structures associated with them can disintegrate.

Moreover, as noted above, in previous agrarian and industrial societies, people lived according to more or less clearly defined social scripts, but economic transformation can mean these can unravel in what has become a more individualised world. Macro-level forces of globalisation, with their associated politics of the market and liberalisation, can impact at the micro level of human experience. Many working class men, for instance, in the older industrial areas of the United Kingdom, have lost traditional roles, and may struggle, psychologically, to cope with change and lost status. Family relationships, including those between fathers and sons, can be dramatically affected, as the old opportunity structures of industrial capitalism disappear. Many working class women, on the other hand, are forced, like it or not, to enter the labour market, often in poorly paid, low skilled jobs, while continuing to carry traditional domestic responsibilities, with implications for the welfare of children. For those men and women in reasonably paid work, increasing demands are being made on their time, under the banner of efficiency, by the greedy work place, while growing occupational insecurity creates pressure across occupational groups. If most people continue to want some degree of security, they are told, persistently, by politicians, in the neo-liberal economic mantra, that this is impossible in a world of cut-throat competition (Elliot and Atkinson, 1998).

Risk

Moreover, sociologists such as Giddens and Beck (1992, 1997) have coined the phrase 'risk society', to capture the impact of these changes on individuals and the choices they have

to make. Ulrich Beck (1997) has observed that individuals are facing a range of insecurities, at a time when they have lost faith in national governments or corporations to address their insecurities or to deal with environmental degradation and pollution. The political agenda, in this view, is dominated by a pervasive neo-liberal economic consensus, in which responsibility has shifted from the State to the individual. The welfare state, in the UK and increasingly across Western Europe, has retreated and individuals, under the banner of lifelong learning, for instance, are 'encouraged' to take greater responsibility for themselves and their lives. People are told to be permanently flexible, which means, as Beck sees it, 'Cheer up, your knowledge and skills are obsolete, and no-one can say what you must learn in order to be needed in the future' (Beck, 2000).

But many people, it should be repeated, are choosing change, as well as change choosing them: under the impact of feminism, black consciousness and the broader politics of identity and representation. There is an increasing interplay of the global and local, via communications technologies, which, *inter alia*, challenge local and familial templates, and offers, however illusorily, a range of lifestyle options. We are forced, like it or not, and however fragile our material world, to make some choices about identity – what it means to be a man or woman, and the values we are to live by – given the market place of competing possibilities in which the old structures of authority – whether of formal religion, or even of science – have broken down or are contested, at least in parts of Western Europe. We have no choice but to choose. Nothing is certain in this 'postmodern' frame and we are faced with the perpetual question of how we should live our lives, and on what terms.

Why people learn: biographical perspectives

A key premise in my approach to research has been that our understanding of why and how people learn has been limited because learners themselves have rarely been encouraged to reflect, in a flexible and longitudinal way, on their motives for and experiences of learning, in the context of their whole life histories and present lifeworlds. Many traditional studies of adult motivation, particularly based on survey and quantitative methods, barely scratched the surface of why people engage in learning, as viewed through learners' eyes, lifewide and lifelong. While researchers using survey methods have asked large and diverse samples of people why they participate in education, they are unable to explore, in all their complexity, the reasons and meanings people themselves give for and to their actions, and how they explain what may be liberating or domesticating in their experience.

Biographical research, on the other hand, offers potentially more nuanced perspectives on the human subject as learner, actively engaged in recomposing a life. Such research can enable us to illuminate the meaning of actions, and the understanding of their significance,

through the stories of those at the centre of the process. Biographical methods have increasingly moved more centre stage in studies of adult learning (Jarvis, 2001). There is also, it seems, an interdisciplinary momentum at the core of such research, given the sheer complexity of actual lives and the stories people tell about them. Learners' narratives cannot, or ought not to be categorised according to narrow disciplinary frames. Stories about learning, for example, frequently defy categorisation as 'sociology', 'psychology' or 'education'. Biographical research tends to expose the gaps between disciplines: sociology, for instance, has lacked any convincing account of how the social, including learning, is translated into changes in inner-life; or why people in 'objectively' similar situations, react and learn very differently. Mainstream psychology, on the other hand, tends towards an essentialism in which learning is conceived in individualistic and asocial ways, as in some North American theories of motivation or adult development. The influence of culture and relationships in shaping who and what we are, and how we learn, are dispatched to the conceptual margins (West, 1996).

Nowadays, I tend to use the term auto/biography to characterise my research (West, 2001). The researcher, in these terms, is a learner too, and draws on his or her own stories to make sense of others' lives, and theirs to make sense of his/her own. The idea of auto/biography challenges the notion of a detached, objective biographer of others' histories: the suggestion that a researcher's history, identity and personality play little or no part in constructing the 'other's' story, or ought not to, in the name of 'objective' science. Michelle Fine (1992) insists, instead, that: '...we are human inventors of some questions and repressors of others, shapers of the very contexts we study, co-participants in our interviews, interpreters of others' stories and narrators of our own'. Fine argues, instead, for the reflexive and self-reflexive potential of experience, in which the knower is part of the matrix of what is known, and where the researcher needs to ask her/himself partly how she has shaped the research, but also how she has grown in it. The researcher is a learner too, with a story to tell.

Telling stories

My first story, about Brenda, is taken from a study of 30 adult learners who entered higher education and were living in communities undergoing major economic and social dislocation (West, 1996). The other two stories are of young women engaged in learning as part of a community arts project in a difficult marginalized community in East London (West, 2002). The first piece of research spanned a period of four years with 7 interviews across a number of research cycles. The longitudinal nature of the process enabled strong relationships to develop and illuminated some of the complex social, psychological and educa-

tional processes at the heart of learner motivation and progression. The second study focused on what learning entailed in the totality of particular lives, and what enabled some young women to progress, as they perceived it, and what such a process might mean.

Brenda and her changing narrative

Brenda was a student in an Access to higher education programme. She was striving, when we first met, to rebuild her identity and career. She was a woman in her early 50s and married to a senior executive. At her first interview she described how she wanted to be a teacher and had done so since she was 14. Her father who insisted, against her strongest wishes, that she work in an office, she said, denied her the opportunity. She experienced a deep crisis of confidence and identity in recent years, exacerbated by her children growing up and problems in her marriage. Her husband, over a period of years, became obsessively involved with work and chose to live nearer his office in another city for most of the week. Life at various levels became uncertain for Brenda and she felt increasing unhappiness and insecurity.

In the first interview she told me, as stated above, that she wanted to be a teacher. We talked about this and her decision to enrol in an Access programme. She referred to changes in her relationships with her husband and children. His workload had become heavier as the firm in which he worked struggled while her children were becoming independent. Such factors provoked basic questions, as she put it, about her past, present and future life-style. Fundamentally, she was asking, like many of the learners, who she was and had been, and what was the meaning of her life.

Her husband was caught up in the increasingly frenetic world of work, with decreasing amounts of time for her and the family. He eventually began an affair with another woman, in another town. At a first interview, she was a diffident woman of 52. She told a tale, like many other students, of being motivated by vocational aspirations (because this was a socially acceptable reason for educational participation). Moreover, she was anxious to serve her husband's needs too, as part of preserving her marriage:

...I'd thought about doing it [being a teacher] for about two years before, on and off. I was also mindful of the fact that the family was growing up and there would come a point when they would start moving away...I needed something I really could get to grips with but that would also be interesting but fulfilling as well...it is important that I have my own little bit of identity down here again with studying. So I can keep motivated....he [her husband] has gone up several... rungs of the ladder, and I feel I'm down here a bit. So maybe that is another motivation as to why I am taking on an Access Course, not because I can in any way, be up there with him, but because at least I will be able to offer him a lively mind.

Brenda was a woman of her time, born at the end of the Second War and socialised into the role of servicing the needs of others. Such women often construe themselves as midwives to others' desires. As the relationship with her husband crumbled and the children left home, Brenda felt bereft. Yet she began to recompose an identity, and build a new career, partly through higher education. She felt affirmed in relationships with other learners, teachers and, most significantly perhaps, her daughter. She was someone with whom she, Brenda, could identity and she felt inspired by her daughter as she, the daughter, completed a degree despite a life threatening illness. The daughter encouraged her mother to take some risk and enter higher education. And, over time, her story changed. Brenda is talking below, some eighteen months later:

Yes, I've gone through a tremendous barrier....Well thinking about going on to Peter, my husband, he is a man: a spade is a spade, that's why philosophy and psychology are completely out of the window, as far as he is concerned. Philosophy you go mad, psychologists...forgive me, you know, as far as he's concerned, if you've got problems well I'll say 'We've all got problems Peter!' you know, we've all got differences and that. He's very much a physicist, he thinks very logically and sometimes that has caused me pain... he's hurt me, you know, with his rather blunt graphic answers.

I think we are all creative in some way or another.

Yes. He's like a peacock and I hate it.... So you see...but what is worrying me about the degree is I can see me actually pulling away. I don't know where it's going to lead...

Brenda struggled, at first, with the research, and tended, as she later acknowledged, to tell the story she thought I wanted to hear. She often did this with men, she said. But she gradually talked more openly and reflexively about her motives and their link to childhood and gender, including abusive parents, not the least as I shared some of my experience of being a child, and needing to appease parents in a difficult family environment. Brenda, at one juncture, was wrestling with feelings of failure, of never being good enough, despite everything she tried. She was stuck for words at one point and I shared my need to gain recognition and acceptance from my mother and from powerful others. Her story was enlivened in that moment of auto/biography, as she talked of realising how her oppression was no isolated affair, but illuminated a highly gendered culture, in which women were often used and abused. She found tutors who empathised and encouraged her, and a heroine in literature, in this case the prostitute in a novel by Mau Passant, with whom she could identity, and who, like her, had been used in a male dominated world.

She began to appreciate that her experience was no isolated, personal affair but part of women's oppression. There were women in the Victorian novel who were abused too and this sensitised her to the cultural, political as well as psychological roots of her suffering.

As is the case with many women the process of understanding and sharing experience, whether fictional or not, can break down feelings of isolation and self deprecation as a personal story is revised and located in broader patterns of unfairness and submission. This realisation enables blame to be shifted from the self towards a culture in which women have been objectified and denigrated. Brenda remained reluctant to describe herself as a feminist but her narrative became significantly more feminist nonetheless:

....perhaps one of the reasons why I recognise it even more now is because of the books we have been studying in Comparative Literature, where we have seen the Victorian heroine...she has married in the real world but her unreal world is fairly childlike. And I can see a little bit of myself, maybe lots of people can see a little bit of themselves in this, you know. I think, at the end of the day, there are areas where we are all children. I don't think, we never completely grow up.

....But I was thinking more of the Victorian wife and mother, the role of wife and mother. And I don't mean that I am an arch feminist. I'm not, but I believe if you have got an interest, it is good to be able to pursue it if you have that ability or the opportunity or the funds or whatever....

Who is your favourite heroine?

Well, funny enough, it is a prostitute...And the reason I feel sorry for her is because she is within the confines of this coach with all these stereotype people who ostracise her, because she is different, because she is a prostitute, because she is a lady of easy virtue. I don't mean I am saying I am a lady of easy virtue but you know, because she is different and they then realise she has this hamper of food and they are on this very long journey. Oh, she is useful to know, let's get to talk to her. So they chat her up, eat her food and they arrive at an inn to stay overnight, I don't know if you know this story, the Prussians, you know, Prussian, Anglo Prussian, Franco Prussians. And the Prussian Officer is interested in her sexually so she doesn't want to know, she is trying to retain her dignity and she eventually gets coerced, emotionally blackmailed, forced, oppressed, call it what you like into going to bed with this chap and is terribly upset afterwards and they all climb back into the coach, by which time they have replenished their food supplies, which they fail to share with....

And the last three lines of that story are so real and so painful, I just could draw alongside with her in that she is trying to hold back the tears of hurt and frustration and anger at being cheated when she really has been open and honest.

Brenda was clearly talking as much about her self as her heroine, and of feeling cheated and exploited across a life; of being hurt, humiliated, and prostituted, even, as she has dutifully given while others continued to take. Her narrative's power derives from finding new languages to invigorate and reinterpret her life story; and by establishing connections

and empathy with significant others from literature as well as 'real' life. She was no longer alone as others' experience echoed in her life and inspired her to take further risks. She was more able to scream, shout, cry, enjoy and learn because she felt more legitimate. She could begin to enter the transitional space between self and others, inner and outer reality, and play. She was coming together in the process, in psychological terms 'not as a defence against anxiety but as an expression of I am, I am myself' (Winnicott, 1971).

Those reading this paper will not know Brenda, of course, at least personally. Except, in a sense we all know Brenda, and her story has an archetypal ring to it. Her narrative may be deeply familiar to those engaged in adult learning, of the struggle of the woman student to become more of a person in her own right. She is there in our adult learning group, and maybe represents part of ourselves. Brenda's story has also to be located in a particular historical time, as economic pressures intrude into the family relationships and as many women reassess who are what they are, under the impact of the politics of identity. Her motives could simply be understood in vocational terms: at the level of wanting to build a career, in the narrow sense. Yet, against the backcloth of her life history and present lifeworld, it was part of a much larger struggle for agency and some legitimacy in her life, at a particular moment of history. Change was choosing Brenda, and she was choosing change, in an effort, always fragile, to compose a life on more of her own terms. To succeed, however partially in the project, required new sets of relationships and the encouragement to experiment with her story, in the transitional space called higher education.

Gina and Shazir: 'cottoning on'

East London has been an especial casualty of globalisation and the politics of the market, as well as, arguably, a beneficiary too. Since the 1970s it has been subject to a massive process of deindustrialisation, dramatized most obviously in the closure of the docks but also affecting the traditional trades and industries of the area. But large pockets of what has been termed 'yuppification' co-exist with the depressed public housing estates suffering racial violence, drug abuse and growing youth employment. It is a place of widespread educational under-achievement and social exclusion, poor health and poverty (Bardsley at al, 1998). Participation in formal post compulsory educational provision, of whatever kind, is low. There are, as indicated, other dimensions to the area, representing, as it does, the Janus face of contemporary capitalist consumerism, one redolent with new opportunity structures (as at Canary Wharf) alongside growing social division and alienation. Despite the towering presence of Canary Wharf, this is a location, in the main, where 'imagined possibilities', for many, are few, and participation in higher, further and adult education tends to be the exception (West and Reynolds, 1999). It is a place where traditional neighborhood and family support mechanisms may have collapsed, under the impact of

economic change and lost confidence. East London may represent, in an acute form, the divided state of contemporary neo-liberal England.

Gina and Shazir live in a community ravaged by economic change and the politics of inequality. But they were encouraged to participate in a community arts project organised by a body called Theatre Venture, which specialised in outreach activities among alienated young people. The project's role was to recruit such young people from local communities and to organise some experimental workshops, employing a range of artists. The University of East London (UEL) was to provide additional workshops for the young people, and students from UEL would work with the youngsters on video production, as part of their own placements. The aim was both to engage disaffected learners in the visual arts and to encourage them to progress into formal arts education. The project was ambitious, and involved recruiting groups of disaffected and educationally alienated young men and women (West, 2002).

Gina and Shazir participated in a series of workshops called 'Cotton on'. They were targeted at young mothers, aged 14 to 19. The focus was the visual arts, and textile design in particular, but also there was sculpture, printing, photography and video, partly designed to explore the theme of pregnancy and parenthood. In-depth interviews were held with Gina and Shazir at an early stage of the project and towards the end. Gina told me about her educational background in which no-one ever really listened to her. She felt pressurised to participate in education and get a job and yet wanted to enter college too. But she had her child to think of. She felt confused, muddled and under pressure, from all sides.

Her first visit to the Centre in which the Workshops were based, was on the advice of a Health Visitor but she felt upset that she was leaving her daughter in the crèche. Separation was hard but she slowly relaxed and was able to let go. She changed, she said, as a result of the parenting programme (of which Cotton on was part). There was a time, she insisted, when she could not tolerate mess, in the home or anywhere else, and everything had to kept in order: 'I hate mess, and everyone goes on at me to let her feed herself'. She never let her baby play on the floor, in case she got dirty, while upstairs other children were 'romping about'. She was more at ease now, and had let go of herself as well as her baby in the workshops. She was taking risks, in short, with an identity and her relationships, including with her own baby, were strengthening.

She liked the Centre and the peer education project, while Cotton-on had given her ideas for the future:

I would like to go back to college, do an Art A level, but I don't know if I am going to be able to do it at A level....Because it is getting crèche places and it is full time, I may have to do a BTEC first. Eventually I want to go back to my media...

Gina had begun a course in Media Communications and Production. Her class in College produced magazines and radio shows. It was 'just basic media stuff' she said, somewhat disparagingly, but she dropped out when she was pregnant. As for the future:

What is the problem? The problem is, the colleges are really good, they have got crèches and everything, but there is not enough places in them crèches. There are so many young mums out there all wanting to go back to college and they just can't because they have no childcare. Childcare is so expensive and once you have got over the money issue it is finding someone to leave your child with, someone who you trust. That is basically it. If you are lucky enough to get a place in the college crèche it is alright, it is wonderful, but there is not enough places.

There was a great deal of anxiety about returning to college, given other pressures in her life, even though, as she put it, she was determined to do so for her daughter, at some stage. It was all too much of a risk just now, in a life which was perpetually framed by an unpredictable present and a turbulent past.

Three months later, Gina was working intensely on her sculpture in the Arts course:

When I was pregnant and I didn't really get very big. I made myself a little pregnant belly from a washing basket to put your washing in. I used chicken wire and plaster of Paris and painted it up funny colours. They kind of expressed my mood when I was pregnant, bit dark, dull colours, bit cold.

Yes… I don't know people who are looking at it probably won't get it, but to me it's a hangover for anger

Her pregnancy was hard and troubling, and she felt, at times, unreal since she did not look pregnant. She was depressed, and 'really ill throughout'. Her mood was translated into the sculpture. She was trying, she said, 'to get across that, the darkness.' There was no head on the sculpture, either, it was a headless torso, she said, which was deliberate:

So there is no head, and I suppose, as I was pregnant I didn't really feel. I suppose all I was, was a baby carrier. That is what I felt. There is no head and no legs because I wasn't actually a person. Like a baby machine. So just middle, just boobs and a belly.

She thought sculpting was therapeutic and that she needed to express her feelings about the pregnancy, and of being 'a baby machine'. Gina also suffered from Crohn's disease, which she did not know when pregnant. The doctors insisted her stomach was troublesome because of the baby and nothing else. She was sick throughout the entire period and anaemic. Her time was spent 'laying around, depressing all the things I wanted to get up and do and I couldn't'. But she was past that now, she said, and the Centre had provided a key. She was starting to use brighter colours too, more 'yellows and reds' and although on medication, she felt better.

She thought Cotton-on had been good. She enjoyed it and it gave her ideas for the future. She wanted to enrol on an art course, maybe do an A level, and the workshops offered a range of relevant experience. She in fact applied to do a graphic design course at her local college, but was doubtful about going through with it. She had always liked art but an A level might be too much, too soon. It was a big commitment given her present life and responsibilities. There were different and conflicting voices inside her. She had done Art at school and she got a good grade there, which she really enjoyed. But College was another story, maybe a step too far just now.

She dreamed of working for a magazine, doing the page layouts and digital designing, 'either the front cover or posters and that. Always me aim. So I am trying to get my art qualifications so that I can get there'. She had gone with 'Hannah', from the group, to a 'Futures Fair'. A career's woman there from the local college gave them a brochure. She needed to act soon, she said, or she was never going to do it. The thought frightened her that she might remain frustrated. But she simply could not take too many risks at present, since there was a baby to worry about.

The art tutor helped her to think about what to do. She and the youth leader encouraged her 'to go for it'. And it was easier for her than some of the other girls, she thought, because, as she put it, she had 'more opportunities than most'. She was smart, by comparison and had a high IQ, she said. And she had already been to college. Gina went on to talk a great deal about her life history. She had gone to 'a really good school' and felt she had a good start, educationally. She came, she said, from a stable home, at least in comparison to some. Her mother worked in a school and had encouraged her to be creative. Gina wrote stories, dressed up and played heartily. And her parents had supported her financially when she was at college.

There had been a 'turning point' in her life, she said. She was sitting at home, one day, and her brother asked what was on television. She could 'reel off the whole of daytime TV, TV guides and I thought oh my god how sad. That is all I do, sit at home watching TV, the same shows every day at the same time. I knew is was a bit sad.' It made her get up and go to the Centre. Her whole life had been sad, she thought, and she did not want her daughter living that way. This motivated her to want to learn, and she enjoyed working with the others in presenting a case to the council for more single-parent friendly housing. She was also engaged in peer sex education programmes for schools. Yet there were continuing doubts about engaging in formal learning or getting a job. She had, on her own admission, a destructive and rebellious side, when she wanted to do nothing, and she disengaged from the group, and art, on occasions. Her anger could hang out in self-denying ways. At the core of the progress, in her story, was her relationship with the youth leaders, and the art tutor,

who acted as surrogate parents. She liked talking to me too, she said, because I listened. And doing art enabled her to face painful aspects of recent experience, and to progress emotionally as well as aesthetically. Art was a way of telling her story.

Shazir and mixed messages

Shazir was living in bed and breakfast accommodation when she began attending the Centre. Her social worker wanted her to take her son 'somewhere and do things'. The social workers thought her incapable of looking after the baby properly, she said angrily. She had 'split up with his dad', because he was 'cheating' on her. The police were involved and the baby was sick 'with meningitis and loads of other problems'. Eventually she 'escaped' bed and breakfast and 'was moved' into a one bedroom flat:

He [the baby] has intolerance, so it is hard to cook for him, good stuff, and I have only got a fridge indoors, haven't even got a freezer to store food for him. I cook fresh food every day for him, which is hard and expensive and the leader tries to help us budget and stuff like that with our money, things like that. It is hard. It is like being in a B & B still because at the B & B you just had a cooker and a fridge and start living like that again. But it is just you have got more space and that is it.

Shazir was initially wary of other group members. She did not like talking to people. They only had 'to say the slightest or do the wrong thing...and I would blow up about it'. Eventually, she settled down and liked the peer education and dealing with issues of sexual health. She felt better about herself as a result. And one of the girls she rowed with had left, which was good. She liked a residential, too, organised by the Centre, which gave her space, as the crèche workers had the children all day. People took turns in cooking and washing up and 'we got on really well'. 'There was canoeing, horses and other outdoors activity as well as the focus on peer education'.

Shazir thought the arts project was 'fun'. She wanted GCSEs, educational qualifications, she said, because she needed 'a job, office work, or whatever'. She had thought about computing, at the beginning, 'but now I wouldn't do because it would just drive me mad, but I couldn't work in an office anyway, can't sit still for a second'. Nothing was clear for her. She never gained any qualifications at school since she ran away from home. And then 'fell pregnant'. The school 'didn't want' her there, in any case, and she hated some of the teachers. She ran away aged 12 and 'carried on running away' until 15. She moved in and out of foster homes and never really settled anywhere, 'until now'.

She had not seen her parents for 3½ years:

Me and my dad never got on. He used to hit me, he used to be really abusive and stuff. I only had to put a slight bit of weight on and he would put me down about it. My mum had

heart disease so she never used to fight back or anything. And I remember when I was little when my mum used to burn food he would throw it across the room because she had burnt a little bit on his plate and I didn't like it. Me and my dad never got on. He used to call me, he used to say I was a little angel but we never got on…Yes, he used to be a lot violent, more when I got older than when I was little. He never used to hurt me that much when I was little but I had really bad asthma and I was in and out of hospital a lot when I was little, so he never used to hurt me that much, because he knew the doctors would be seeing me quite often…

She used to fight back, as best she could. She once dreamt of being doctor, when she was five: 'I went through about 10 years of thinking I wanted to be a doctor. Always wanted to be a doctor. And then a journalist, and then went through all the jobs'. Her dad told her she would make a good doctor. When her sisters 'had cuts' she used to bandage them up, 'or put plasters on, get all the dirt out, stuff like that and he said I was good at doing things like that'. But she knew she would never make it. She might like to be a school teacher, and when her son went to school, she could go to College: 'three years in college and a year in uni and I could be a junior school teacher'. She still had a dream.

She might, for instance, teach English. She was 'always' good at it in school. There was a 'top band and bottom' and she was at the top. She didn't like poetry, or Shakespeare. Macbeth 'was too nasty'. He used to hurt people, 'and that little boy that got stabbed and they showed us a film clip and it was horrible and I didn't like that at all. And the words they used I didn't like'. Sometimes she used to go to school 'for a whole week and not bunk'. But she got 'a bit lost' with 'heroin and stuff like that'. Macbeth seemed, as she talked, too close to home for comfort.

She stayed with a friend and 'it would start off with a little bit of weed, think nothing of it, and just went a bit further than we should have done'. She did not blame her parents 'really'. There were reasons for what happened, which she understood.

But I don't think I will ever forgive dad for the way he has been because if he wasn't, if he was protective and nasty I would probably would have done better at school and if he had made us feel more comfortable to talk to him about stuff, then I would probably have stayed in school or gone to school, but me and my dad, I mean he, sees the baby, he doesn't see the baby, but he makes remarks like, your baby is evil because he is a white man's baby and he would kill him if he saw him, but he knows that I would never let him do it.

She said she was like her Dad and they were both 'stubborn'. She shared his temper and people told her she looked like him: 'and I don't like that. So that is why I have cut all my hair off and try and change it because of the comments that I look like my dad. I change something about me'. This aspect of the story places identity work and risk taking, in an acute

and highly personal form. We are also reminded of how children of abusive parents often continue to crave for their attention, however abusive, for fear of the alternative of abandonment. In Shazir's narrative, moving between different cultures, as well as between hate for and wanting attention from parents, compounded a sense of fragmentation.

She joined a Christian Church, via an organisation called 'Lifeline'. The vicar and his wife helped her with her baby, when she needed it most. They were 'there when he has been sick, and the hospital when I need them, and stuff like that. They come up to the flat and make sure he is OK. They have been like surrogate parents to me'. Shazir talked about how her father 'went all out of control and everything. He had a breakdown three times and used to leave us, leave us with all these debts and stuff and then come back again and nothing happened. And mum couldn't cope with it any more. She used to sit back and do whatever he used to tell her to do. And it has always been like that'. Stability, among significant others, was a precious commodity.

The conversation turned to art at this point and Shazir talked animatedly, again, about it being 'good fun'. She told me about a cushion she made with her baby's picture on it:

... on the front of it, printed on to fabric, which is quite interesting. I didn't know you could do that. And I was meant to be making a wall mount with all these pictures from nought to a year, going through what he used to do, and stuff like that. Haven't finished doing it yet. I have done a few because it is getting the pictures, because I have got to go through all the pictures and try and find them at the right stages and I haven't done that yet. But we done that with the plaster stuff, done it on our hands and done a lot of painting and stuff like that. We have cut out mushrooms and everything. Experimenting like a 5 year old again, so it has been quite fun.

She loved art at junior school, 'all the time'. She even did art in her lunch break and just talking about it made her feel like 'a kid again, messing about with paint. You really think about doing it now. Except when you do it with your little boy or girl. And it is quite weird because you sit there and just splash paint around and that is nice, just do a little bit more here and there. So here it has been quite like a therapy'. It had made her more aware of her son's need to play and experiment, 'instead of thinking he is going to get dirty all the time'. She bought crayons and paints and he can 'splash paint around and make it more exciting for him'. She was changing: 'You see more things in perspective when you are doing art, because you see more colours and stuff and you think this would look better in his room, this would make him more cheerful. Stuff like that, yes it does. And you make more things for him too'. Shazir smiled as she talked, which she did with her counsellor, she said, as she told me about that experience. She rarely talked about 'family stuff', because it made her feel 'like jelly', but she could talk to me. Sometimes in the group someone would burst into

tears, but they went outside 'for a smoke and talk about it and cuss our boyfriends off, or babies' fathers off'. It was 'nice' to have people who could say 'I know what it feels like', or just listened.

There were no dreams of college, or a job, at present because her son took priority. 'No-one knew what was wrong with him', she said. The doctor was waiting for test results, and the uncertainty dragged on. One day he was fine, and then he was ill. She missed working and had been a chef in old peoples' homes. She hated 'sitting round doing nothing'. And, 'hopefully', one day she might train as a teacher. The Centre, she said, had been a lifeline, 'more like a family, one big family we are, quite good'. Shazir's story takes us to the heart of a social psychology of building a biography, and into the role of art and relationships in taking risks, and becoming, however fleetingly, more of an agent in a life.

Understanding biographical learning

What insights might be drawn from such stories about why people learn and what enables them to progress as learners and how might this be understood? For young women like Gina and Shazir, but also Brenda, making progress in a life and re-building an identity, is especially hard when people feel overwhelmed, powerless and low in self-esteem. A person, any person, needs to feel, at core, accepted and encouraged, to engage in biographical learning. They have to be able to see themselves – in the eyes of others as well as self - as a learner or a budding artist, rather than a failure and inadequate. They have to be able to take risks and enter and engage in a community of practice. They must learn to tolerate the deep ambivalence of moving from the safety of the periphery and of defensiveness towards the world, to embrace membership of a group and the new identity this brings (Ainley et al, 1999).

Engaging with what is new and different, and investing of self in the process, brings, in turn, anxiety about being rejected, of being found wanting, all over again. The young women in Cotton-on knew, experientially and existentially, what it meant to be an outsider, to be labelled stupid as well as incapable. All of which explains why some retreat into 'defiant outsiderdom'; and others simply give up completely (Ainley et al, 1999). Yet, it is to be noted, that, in certain respects, when viewed in the light of a life history, Brenda and the two young people were managing difficult biographical processes rather well, despite the anxieties generated.

Hollway and Jefferson (2000), drawing on the work of Melanie Klein, argue that anxiety is fundamental to the human condition and that unconscious defences come into play when a self and identity feel threatened. Klein's insights are derived from clinical work and she argues that defences against anxiety operate in relationships between people, both in early

as well as subsequent experience; including when something unfamiliar and unsettling is encountered. But defences can be lowered, over time, as significant others – teachers, an art tutor, a therapist and or a guidance and worker – can contain some of the anxiety by providing reliability, psychological consistency and a sense of unconditional acceptance. All of which can enable someone to enter transitional spaces – as in art, higher education and or a relationship with a guidance worker – to take risks with their story and identity. For others, staying on the edge can be a defence against the risks involved. There can be safety in the margins.

Risk taking, and becoming more of an agent in composing a career, in the sense developed in this paper, is no individualistic affair, but fundamentally inter-subjective. In this reading, we exist and subjectively develop in shared spaces of affective intercourse, in which there is a fundamental overlapping of one and another. Contemporary psychoanalysis, especially feminist object relations theory, takes as its prime focus the changing, multi-faceted and highly contingent subject in the process of becoming, which partly explains its appeal to some educators. In this reading, human beings do not exist in relation to each other as mere physical bodies, positioned according to distance relationships while identities are far more than positioning in text. We exist and develop, rather, in a shared space of affective intercourse in which there is a fundamental overlapping of one and another. The infant, for instance, can be seen to exist in the gestures and meaning of others. Communication, and learning, cannot be reduced to participants in isolation (Diamond 1998). As with the infant, the adult, especially at times of vulnerability, loss and change, can feel frightened, and anxious. If the shared space of affective intercourse in which we are situated, however – our relationships with others, including those in educational settings – provides some security, a sense of basic acceptance to enable us to acknowledge our vulnerabilities, as well as some challenge, then we can begin to learn, play and tell new stories, in emotionally more open, experientially inclusive, and critically diverse ways.

Psyche, in feminist object relations terms, can usefully be considered as consisting of a cast of characters, of people and interactions in the social world, which become part of inner life. Some people may injure and constrain us; others inspire and give us a sense of legitimacy and existential hope. The external drama is internalised, in childhood and throughout a life. But casts of characters can change as new people enter the social stage. Such significant others – 'good objects' in the language of object relations – mirror new biographical learning possibilities for us. The feminist movement provides a telling case in point as many women have found, in and through the support of others, the psychological resilience to rewrite the story of their lives. New people become part of our inner drama, pushing us, potentially, towards greater agency, and a fuller and critical engagement with

our existence. Biographical narratives, like those above, are often saturated with material about significant others and the importance of supportive yet challenging relationships in 'life-spacing' and managing biographical discontinuities. Feminist object relations theory provides a language to explain how the intersubjective may be translated into more vibrant, intrasubjective life, providing the energy, and will, to challenge the stories that bind.

Stories, relationships and learning

The role of story in adult learning is clearly central. Jeremy Holmes (1996) has written that 'autobiographical competence' – the capacity and confidence to compose one's own story - is central to emotional health, including finding meaning in a life. The word 'narrative', Holmes notes, derives from *gnathos* or knowing. Narrative, he suggests, 'turns experience into a story which can be temporal, coherent and has meaning'. It creates, potentially at least, links between past, present and future. Raw material is translated into symbolic form, which allows a person some detachment from what may be painful raw experience. The recognition of the role of narrative in mental health has of course a long history. Freud, as noted, argued the therapeutic power of story and the importance of a narrative truth in 'the talking cure'. But creating a more eclectic and experientially authentic story – whether through art or feminism - is also, I suggest, at the core of profounder forms of adult learning, in the broadest sense. Stories can be seen as vehicles for experiments in self composure: the more a story convinces others, whether teachers or researchers, the more it may constitute a new, emerging reality of self.

Narrative structures, in this perspective, may themselves organise and give meaning to experience rather than being simply reflective of it. At a first interview, in the early stages of an Access programme, for instance, a student, like Brenda, may offer an account that is deferential, even self-demeaning, with significant details omitted in the desire to impress others or because they are considered inconsequential. By the end of four years of study, a more distinct voice and inclusive story may be articulated. Developing a story is essential to building and sustaining a biography and to making choices at key moments of transition, if we can find people willing and able to listen.

The challenge of auto/biographical perspectives

Auto/biographical research of the kind described in this paper provides enriched and nuanced insights into what encourages and enables people to learn, lifewide as well as lifelong. It offers access to the struggles, we all share, with the constraints and possibilities of social circumstances; of our unique yet interconnected biographies; and of the vulnerability but also the robustness of the human psyche and our capacity to learn from experience, how-

ever painful (Hollway and Jefferson, 2000). Such research provides glimpses into the preconditions for agency, lifewide as well as lifelong. At the core of such transformational processes lie the relationships in which we are embedded and the extent to which these bring legitimacy and challenge, or their opposites; and the availability of suitable transitional spaces – an adult learning group or the community arts – in which we are encouraged to take risks, to play, dream and imagine. And then there is the quality of the story we tell to others and ourselves: whether the story is becoming more open, experimental and experientially inclusive, or lifeless, detached from experience, repeating, maybe, what powerful and demeaning others may say about us. Brenda, Gina and Shazir were telling new stories, in more life enhancing ways: a process fundamental to adult learning.

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WHAT IS SIGNIFICANT FOR ADULTS' LEARNING?

Knud Illeris

Abstract

In contrast to children's learning, which is fundamentally uncensored and confident, the most significant feature of adults' learning is that it is selective. To be an adult both legally and psychologically means that one is expected and able to take responsibility for one's own behaviour. This is at the core of our celebrated concepts of freedom and democracy, and also applies to adults' learning: Adults learn what they want to learn and what is meaningful for them to learn, in their learning, adults draw on the resources they have, they take as much responsibility for their learning as they want to take (if they are allowed to), and they tend to avoid, reject, reduce or distort any learning in which they see no meaning or interest. Therefore effective and meaningful adult learning presupposes that learners have accepted the learning tasks in question. Pressing or forcing adults into learning courses against their interests or conviction is a waste of public and personal resources, whereas respectfully guiding adults into subjectively meaningful learning is at the core of the concept of lifelong learning. This issue will be illustrated by experiences from a three-year research project in the popular Danish adult education systems.

Introduction

The last decade has seen lifelong learning become a key issue in international education policy. The concept basically involves the simple message that learning can and should be a lifelong occupation. This poses the fundamental question of whether the processes of learning are the same irrespective of age.

In my book, *The Three Dimensions of Learning* (Illeris 2002), I endeavour to develop a comprehensive and contemporary understanding of learning by examining a large number of relevant existing and acknowledged learning theories and approaches – American, British, Continental European, Nordic and Russian – trying to draw from each the really significant elements and to merge all these into an overall pattern.

On this basis, I take up the issue of learning and life age by attempting to show the essential characteristics of learning in each of the four main life ages: childhood, youth, adulthood and mature adulthood. Of course, these descriptions cannot be derived from theory alone. On the contrary, they must simultaneously be solidly grounded in practical studies. Another source of this paper is, in accordance with this, my studies and developmental work in various contexts of adult education, including a recent three-year project dealing with adult education as experienced by low skilled and unemployed learners (Illeris 2003, 2004).

Capturing the world

In order to see what is characteristic of adult learning, I shall start by pointing out some basic features of children's learning:

In general, learning in childhood could be described as a continuous campaign to capture the world. The child is born into an unknown world and learning is about acquiring this world and learning to deal with it.

When viewed in relation to later phases of life, two learning-related features are prominent, especially for the small child. In the first place, children's learning is comprehensive and uncensored. The child learns everything within its grasp, throws itself into everything, and is limited only by its biological development and the nature of its surroundings. Second, the child places utter confidence in the adults around it. It has only those adults and the ways in which they behave to refer to, without any possibility of evaluating or choosing what it is presented with. It must, for example, learn the language these adults speak and practise the culture they practise.

Throughout childhood, the child's capturing of its surroundings is fundamentally uncensored and trusting as it endeavours, in an unlimited and indiscriminate way, to make use of the opportunities that present themselves. Of course, late modern society has led to growing complexity and even confusion of this situation as older children receive a lot of impres-

sions from their pals and especially from the mass media, which go far beyond the borders of their own environment. But still the open and confident approach must be recognised as the starting point.

Adults' learning in modern society

In contrast to children, adults are capable of directing and taking responsibility for their behaviour, actions and opinions and, thus, also for their learning. This definition is, at any rate, at the core of society's definition of adulthood. One formally attains adulthood on reaching the age of 18, and it is at this point that we all claim the right to make our own decisions and take on responsibility for our own lives and actions. This is fundamental to what we regard as freedom and democracy.

In this connection, it is worth noting that learning is basically a desire-based function. It is a part of our species' potential that we can learn far more, and much more complex matters, than all other creatures, and this learning potential is the strongest and most crucial element in the species' struggle for survival. Like all other innate potentials for the survival of individuals and species, it is grounded in desire. This can be seen most clearly during the first years of life when the child acquires a number of basic skills and concepts, but it also applies to adults.

It is, however, also a fact that, over time, everyone acquires experiences of learning which are difficult and unpleasant, for example, when one learns about the limits to one's fulfilment, or, more generally, when one is obliged to follow a course of learning which, for whatever reason, one has not chosen. This, naturally, becomes inevitable as soon as a social formation is involved. A balance must, therefore, be found between individual interests and common considerations. Modern, complex society involves a huge amount of learning that, to a greater or lesser extent, is determined by others.

Institutionalised learning

In practice, in our society, schools have developed as the institutions where all of us have to learn a lot of stuff that we have not chosen ourselves. Therefore, adults' attitudes to schools and education are generally very ambivalent. On the one side, we know very well that learning can be useful and rewarding and even joyful in many ways. On the other side, institutional learning is often demanding, usually directed by others, and sometimes boring and tiresome.

Traditionally, adult education has been voluntary, and it has therefore also been the normal situation that the adults themselves have chosen the course in question. It might, therefore, be expected that the adults would themselves take responsibility for the learning provided by the course. However, two conditions complicate this.

Firstly, some ordinary conceptions and experiences of education often intrude. Even though the institutions, the teachers and the students might say otherwise, everyone in the education situation obstinately expects that the responsibility will lie with the teacher. This is what we all have experienced at school, and unconsciously we take this picture with us into adult education.

Secondly, many participants in adult education today are not there of their own volition, but because they are forced to be there, directly by authorities or employers, or indirectly because they have to learn and qualify themselves if they are to avoid the marginalised situation of the unemployed.

These complications lie behind a very complex and paradoxical situation that can be observed in most adult education courses today. On the one hand, the adult participants behave like pupils, taking no responsibility and waiting for the teacher to direct the course and tell them what to do. On the other hand, they have a very hard time accepting the lack of authority that the traditional role of pupil entails. As adults, they are used to directing their own behaviour and deciding for themselves.

Thus, when adults enter an institutionalised education programme, there is a distinct tendency for them to slip into the well-known pupil role where control and responsibility are left up to the teacher. This is the least demanding role to adopt, and often the teacher is also inclined to take on, and even insist upon, the traditional, controlling teacher role. It is only in the very few cases when the participants are brought to realise that they can take responsibility and use the teacher to support their own learning that the picture alters.

Defence against learning

In addition to this, in our complicated modern society the amount one can learn far outstrips what any person can manage, and this applies not only to the content of learning but also to the options for attitudes, modes of understanding, communication possibilities, patterns of action, lifestyle and so on. Selection becomes a necessity, and, in principle, adults would like to carry out and take responsibility for this selection themselves.

Thus, adults' basic desire to learn and their wish to direct and take responsibility for their own learning are strongly modified, first by the impact of their school experiences, and second by the inevitable selection which is necessarily developed into the kind of semi-automatic defence system which has been described as "everyday consciousness".

The way this works is that one develops some general pre-understandings within certain thematic areas. When one meets with influences within such an area, these pre-understandings are activated so that if elements in the influences do not correspond to the pre-understandings, they are either rejected or distorted to make them agree. In both

cases, the result is not new learning but, on the contrary, the cementing of already existing understanding.

This is why adults are rather sceptical and often reluctant vis-à-vis everything that others want them to learn and which they themselves do not feel an urge to learn. Consciously or unconsciously, they want to decide for themselves. But, at the same time, it is easier to leave the decisions to others, to see what happens, and retain the right to protest, resist or drop out if one is not satisfied. In sum, the attitude is thus very often ambiguous and contradictory.

Characteristics of adult learning

To sum up, the fundamental characteristics of adult learning seem to be that:

- adults learn what they want to learn and what is meaningful for them to learn
- adults draw on the resources they already have in their learning
- adults take as much responsibility for their learning as they want to take (if they are allowed to)
- and adults are not very inclined to learn something they are not interested in, or of which they cannot see the meaning or importance. At any rate, typically, they only learn it partially, in a distorted way or with a lack of motivation that makes what is learned extremely vulnerable to oblivion and difficult to apply in situations not subjectively related to the learning context.

Life projects and identity

Thus, adults undertake a very stringent process of selection in connection with their learning and the premises for this selection are to be found in their experience and interests. This can be a matter of very superficial, short-term interests, something that challenges their curiosity, or which is topical and perhaps provocative. But, more fundamentally, adults usually have some life projects that are relatively stable and long-term, for example, a family project that concerns creating and being part of a family, a work project that concerns a personally and financially satisfying job, perhaps a leisure-time project concerning a hobby, a life project to do with fulfilment, or a conviction project that may be religious or political in nature.

These life projects are embedded in the life history, present situation and possible future perspectives of the individual and are closely related to what we call identity. It is on this basis that we design our defences so that we usually let what is important for our projects come through and reject the rest. It is also on this basis that, as the central core of our defences, we develop defence mechanisms to counter influences that could threaten the experience of who we are and would like to be.

These matters typically comprise the fundamental premises for school-based adult education seen from the perspective of the participants. They make the participants' initial motivation quite crucial, that is the way in which they regard the study programme or course in question in relation to their life projects.

In some cases, adult education can lead to extensive, enriching development for the participants if they arrive with positive motivation and the study programmes live up to or exceed their expectations. But our studies in the broad Danish adult education programmes showed that a quite considerable proportion of the participants only become positively engaged in adult education if they meet a challenge that 'turns them on' at the beginning or along the way. In most cases in current adult education, the situation is that the participants only engage themselves superficially and do not learn very much, leading to the waste of a great number of human and financial resources.

What we all must realise is that the adult's way of learning is very different from the child's and that adult education must, therefore, be based on fundamentally different premises. The basic requirement is that the adult must take, and must be allowed to take, responsibility for his or her own learning. It is decisive that education programmes and teaching practice respect, support and even demand this. We all have a great deal to learn in order to fully understand these fundamental conditions of adult learning.

Responsibility for own learning

As described, the most fundamental difference between children's learning and adults' learning is thus related to how the learning is controlled. In recent years, this matter has, however, been much debated from a somewhat different angle, i.e. the debate on "responsibility for own learning". In Scandinavia, this debate has especially been directed at youth education programmes, the background for this being that young people have not been as willing to learn "what they have to learn" as was previously the case, if they have not been able to see or accept the intention behind it. In so doing, the young people *have* actually, in their own way, to an increasing extent assumed responsibility for their own learning, or, at any rate, their own non-learning. The underlying opinion of many debaters has, however, been that young people should themselves assume responsibility for learning what somebody else has decided.

For adults, the problem is somewhat different. As a point of departure, adults clearly want to decide what they want to learn and do not want to learn. The very nature of adulthood requires involves, both legally and psychologically, that the individual assumes responsibility for him/her self, his/her actions and opinions. This is the general situation of learning in everyday life, and thus adult learning is by nature self-directed – and, strictly speaking, the

issue of self-direction as discussed by Malcolm Knowles (1973, 1975) and many others can never be a discussion about learning but only about education and organisation.

But when adults then enter into institutionalised learning situations, a kind of regression often takes place: they easily slip back into the pattern they know so well from their schooldays. They leave responsibility in the hands of the teacher, and the teacher is also almost always willing to assume responsibility, and even parts with it only reluctantly (cf. Illeris 1998). In this way, there is a reversion to childhood, leading to a highly ambivalent situation in which the adult participants both want to and do not want to decide for themselves.

Most adults, except perhaps the youngest, appear somehow to have acquired the perception that institutionalised learning is something that belongs to childhood and youth. When, as adults, people participate in courses and training programmes, they typically use the phrase "going back to school", and this phrase typically reflects the feeling of reversion to childhood, disempowerment and perhaps even humiliation that lies just below the surface of many people who have not made a clear individual choice to be in the learning situation. As Australian David Boud has documented (Boud 2003), adults in general do not like to be labelled as learners, not to say pupils. Because then it is precisely the case that others decide what the individual is to do, that the individual is stripped of the authority of an adult, and that the individual is not good enough as he or she is, because then obviously the whole thing would not have been necessary. This sentiment has deep roots, it necessarily has an impact on the learning, and teachers often tend to suppress the fact that it is so. Therefore we often hear in adult education programmes the phrase: "We *are* adults, aren't we?", spoken as a sort of mantra in situations where the similarity with the submission of childhood learning becomes a little too insistent.

There is, however, no doubt that the learning progresses best when adults themselves accept decisive responsibility. But this presupposes that the framework of the education programme provides opportunities for such responsibility, i.e. that not too much has been decided and determined in advance, that the teacher consciously provides space for it, and that the content of the programme makes it fundamentally possible for adult participants to learn something which they themselves think is important and meaningful.

Thus, the question of whether the intended learning is or may be subjectively meaningful becomes entirely decisive for adult education programmes, and the answer lies in the participants' situation in life, their backgrounds and their interests. The educational significance is that the learning that adults derive from a programme of education to a very high degree, and a much higher degree than for children, depends on the conscious and subconscious motivation they bring to the programme, and how the motivation is met. This

motivation is, naturally, not beyond the reach of influence, but outside influence, whether it assumes the form of conversation, guidance, persuasion, pressure or compulsion, will always be received in the light of the individual's own experience and perspectives. If they are to change the possibilities for learning, the influences must be convincing on this basis, i.e. the adults must accept them psychologically, and must be brought to see the meaning with the education programme in question for themselves and their situation.

Learning strategies

Precisely this paradox may also both generally and in relation to the concrete and current situation in adult education be understood as the background for the observation that adults in a learning context typically more or less consciously practise a number of strategies for their learning. It must be understood as a kind of behaviour that aims to balance both their own ambivalence and the contradictory situation in which they find themselves. In our research we have, among other things, taken part in attempts to discover and understand a number of these strategies as they find expression in the everyday life of education (Illeris 2003). We found that the strategies unfold at two levels.

First, at what might be called an intermediate level, because it is not concerned with the most general matters pertaining to the act of learning as part of the course of one's life, and on the other hand it is not concerned with individual concrete situations either, but with how one might handle the relationship between the way in which the learning course functions and one's own relationship to the course.

Second, at a more concrete level, it is concerned with the ability to live with the daily small and large manifestations of the tendency towards outside control and disempowerment which, as described, lies latent in the adult education programmes in all the cases where the adult participant has not undertaken the education programme fully driven by her or his own wish and interest. It is especially characteristic at this concrete level that the individual participant does not apply merely one strategy, but in the course of the day applies several different strategies and assumes many different positions.

At the first level, one may in certain cases meet participants with "pure" positive or negative strategies, either concerned with making the most of it at all times or having abandoned all pretence and just not caring at all. Such attitudes are very rare and probably require a degree of clarity that the complicated conditions do not exactly promote. There were, on the other hand, other strategies that we found widely common.

The most positive of these strategies focuses on the effort of the individual participant to find out which elements of the course might be subjectively useful or personally satisfying to acquire, to concentrate on this, and more or less ignore the rest. The elements that are

selected are then typically practical skills and knowledge which for the individual might be perceived as useful in everyday life, in working life or with a view to gaining employment. This may, for instance, typically be practical craftsmanship techniques and skills, knowledge and skills within information technology or the acquisition of foreign languages. However, there may also be commitment of a more experiential or enlightening character, e.g. within film, theatre or literature.

The other widespread strategy at this level is seen in the more instrumentally orientated individual, who aims to complete the course as easily as possible, i.e. to figure out what is formally and informally acceptable and then just meet the lowest performance requirements permissible while avoiding trouble. If, for instance, a certain attendance rate is required, e.g. for obtaining formal recognition of participation, the person will make sure to meet the requirement and no more, and generally take part in no more of the activities than what is required to manage, academically and mentally.

At the more concrete level a multitude of more socially orientated strategies flourish, which are often perceived by the teacher as annoying and deviating in relation to the planned programme. This may e.g. be the use of humour and irony, which may provide an outlet for frustrations, insecurity and an experience of inadequacy, and which at the same time may break the monotony, make the situation more tolerable, and which it is difficult for others to relate to in a negative way. It may also be that a person ceaselessly complains, not so seriously that real action must be taken, but perhaps more to while away the time, maintain some sort of self-respect, and challenge "the system" a little bit. A third possibility may be "dynamisation", i.e. throwing oneself into certain elements or activities in the education programme and devoting enormous energy and attention to them in order at least to feel alive and active, more than in order actually to acquire the skills or knowledge. It may also be the perfectionist strategy to pursue certain parts or elements of the programme down to the smallest detail, so the person may achieve a sense of mastery and competence, without it being in any way particularly important or relevant.

As regards learning, the strategies will figure as a defence against the developments and changes which the programmes aim to achieve but which the participants find it difficult to accept.

Therefore they also appear as hindrances for the intended learning, but rarely as the more focused resistance that may possibly promote alternative fruitful learning. Generally, the strategies must therefore be considered signs that there is something inappropriate in the situation, most often an underlying clash or incongruity which ultimately is concerned with matters that the participants have not accepted and perhaps cannot accept, and to which the teacher or the institution are only able to respond in a more or less superficial way, because they are rooted in a more fundamental societal and political conflict.

Wisdom

In this connection, quite a few psychologists and philosophers have referred to the popular concept of wisdom, which is usually ascribed to a chosen few older people. There is certainly no agreement as to what the specific characteristics or criteria of such wisdom are, but it seems in general to be related to life experience and often also to an ability to accept ambiguity and see issues and problems from various perspectives. Sharan Merriam & Rosemary Cafarella conclude an examination of several writings on wisdom with the following statement:

"Although it has been discussed over the ages by the great philosophers and theologians, this area of study has received little attention in the literature on cognitive development and learning in general. […] Despite the different perspectives from which wisdom is viewed, scholars seem to agree that wisdom involves special types of experience-based knowledge and is characterized by the ability to move away from absolute truth, to be reflective, and to make sound judgements related to everyday life." (Merriam & Cafarella 1999, p. 167).

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HUMAN LEARNING AS EXISTENTIAL: BEHAVIOURISM REVISITED

Peter Jarvis

Abstract

Over the past fifteen years I have been continually modifying my model of the learning processes, as further research has built upon my original empirical research – first published in Adult Learning in the Social Context in 1987. At that time I implicitly recognised the existential nature of learning but was too orientated to a more sociological understanding in contrast to the prevailing psychological theories of learning. Now I recognise that learning is an existential phenomenon, and in this presentation I want to demonstrate that some of the major theories of learning (behaviourist, cognitive, social and experiential) all emphasise different aspects of our existential being. In addition, I want to argue that the instrumentalism underlying much policy about learning fails to recognise that the instrumentality of learning is ultimately existential. Hence learning throughout the whole of life is basically about being and becoming who we are.

Introduction

As our understanding about human learning is increasing, and the theories of learning have passed through a number of stages - behavioural, cognitive, social, experiential to existential (Jarvis, 1992), we have often failed to revisit the previous stages. We do need to do this in order to see their strengths and weakness, to re-interpret them and to integrate them into present thinking. This has certainly been true in the education of adults which is essentially a practice-driven study, more concerned about the present than the past. If, as I maintain, learning is both complex and existential then we should be able to revisit past theories, re-interpret them and see how they fit into our present understanding of learning. The aim of this paper, therefore, is to do precisely this with behaviourism, and to show that when fully analysed it might be seen to be part of an existentialist understanding of learning. The paper has two parts: in the first a brief account of my own work in learning theory and my own model of learning is discussed, highlighting one or two relevant aspects for the succeeding discussion. In the second, behaviourism is re-examined and re-interpreted and shows that it might be understood in the light of today's understanding had it been inadequately theorised. Indeed, the false pre-suppositions of quantitative research when applied to research into people made the interpretation both inadequate and inevitable. Finally, there will be a concluding discussion.

An Existential Model of Human Learning

My research into human learning began in the mid-1980s when I conducted empirical work into the way that some 200 adults learned. That research was fully reported at the time, and the book also included a model of human learning (Jarvis, 1987). I recognised then that the model was over-simple and I have subsequently returned to it a number of times as I have endeavoured to understand learning better and the model produced below is a much later edition. I have also changed my definition of learning on a number of occasions in order to make it fit with my current thinking. I would now define it as a combination of processes whereby whole persons transform episodic experiences into cognitive, physical and affective outcomes and integrate them into their biography.

Clearly this is a complex model which would take more space to discuss in detail than I have here (see Jarvis, Holford and Griffin, 2003), but there are a number of things that I want to raise since they are pertinent to this discussion. First of all, it is whole persons who enter situations and construct their own experience. But the whole person is a problematic concept. Traditionally, in the West, the person has consisted of body, mind and soul but the definition, and even the existence, of the soul has been open to considerable scrutiny. More recently, some thinkers have related the soul to the self (see Crabbe, 1999) and

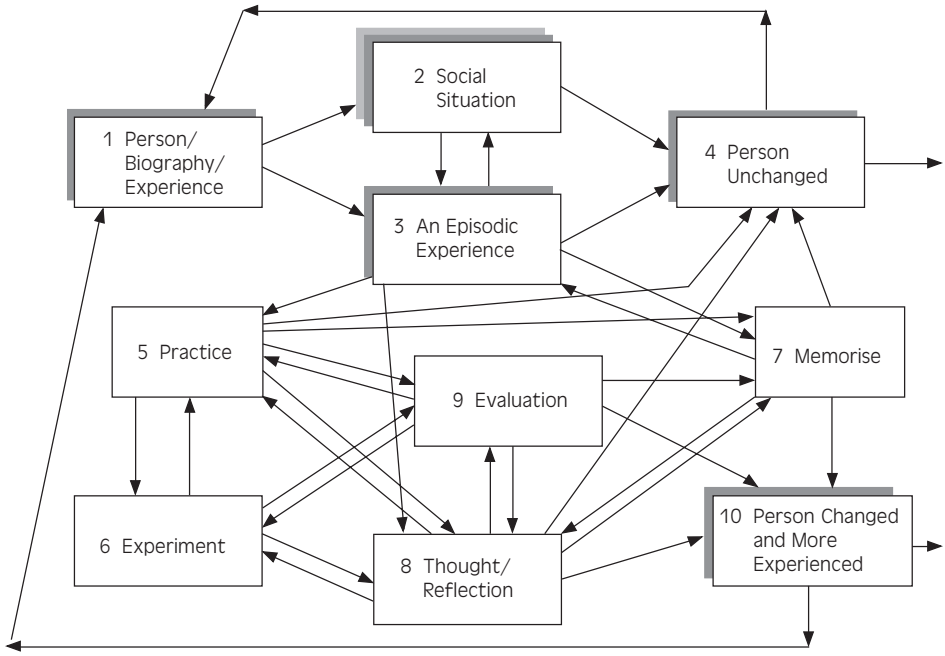

Figure 1: A Model of the Processes of Learning

others relate both to the idea of identity. However, the terms soul, self and identity may all be said in some way to be constituent elements of mind. In the very least, therefore, the person consists of body and mind, although these are not separate and distinct entities, as Ryle (1949) so forcefully argued many years ago and as neurological research has more recently verified (Greenfield, 1999). Mind, as this research indicates, is a construct illustrating the cognitive content of the neurological activities that brain research has demonstrated. Mind, as such, does not exist but the brain does. Mind, in some way transcends brain and enables us to know ourselves as persons, in relation to the external world. Body and mind are at least an internal dualism in relation to the external world, as Marton and Booth (1997, p.122) have suggested. Now the whole person who enters social situation and has experiences (Box 1) consists of body (genetic, physical, and so on), mind (knowledge, attitudes, beliefs, values and the emotions). In a sense, I want to hold the emotions as separate since they are not necessarily experienced verbally, although they might be explained in words. Nevertheless, persons bring their memories of their life histories into the social situation and this affects their consciousness of their environment.

The second point to mention is the social situation (box 2). People can never be free of a situation and whatever it is, individuals are to some degree or other usually conscious of it

during their waking life, although that level of consciousness is not always constant. Nevertheless, this awareness means that people are recipients of the social pressures of the situation and when persons are in situations, they construct specific, or episodic, experiences (box 3). Our perceptions of the situation are not like cameras recording everything equally, and so our experiences are actually individual constructs. This is certainly not the place to discuss the concept of experience since Oakeshott (1933, p.9) suggested that it is one of the most difficult words in the philosophical vocabulary, and one that Valberg (1992) called a puzzle. It is whole people's constructed experience (box 1) that is transformed and there are many ways in which this can occur, depicted as the number of routes from box 3 to box 10. These are the learning processes which I will only summarise: whole persons learn by doing (boxes 3→5→9→7→10); by thinking (boxes 3→8→9→7→10); by memorising (boxes 3→7→10). Whole people (knowledge, skills, attitudes, beliefs, values, emotions and the senses) can learn through any combination of the processes either simultaneously or sequentially and each of the constituent elements may be affected differently in each learning experience. Or, individuals may not learn at all (boxes 3→4) and so the person is not changed. However, as a result of learning, the person grows and develops (box 10), so that learning is one of the driving forces of personal development – the other being the biological development of the body. This growth and development of the person continues throughout the life span through continued learning. Consequentially, it will be noted that from boxes 4 and 10 there are two arrows – one to depict the fact that time does not stop and that life proceeds; the other returns to box 1, indicating that the learning process is continuous.

Learning, therefore, must be understood as an existential process in which the person is always becoming, continuing to learn and develop, and the process is never complete during being, the whole of the life span.

This is a very brief summary of my own work on learning as an existential phenomenon, which will suffice in order to illustrate the argument of this paper.

Behavioural Theories of Learning Revisited

There have been many behavioural theorists of learning – from Pavlov to Skinner – and two major theories, classical and operant conditioning. In this section these two theories will first be described and then re-analysed under four sub-headings – stimulus, response, research methodology and definition of learning.

All the theories of learning are what psychologists describe as stimulus-response (S-R) theories and they all argue that scientific research must ultimately be translatable into something that can be observed – and usually measured. In this sense they are positivist and

quantitative. According to Borger and Seaborne (1966, p.68) Clarke Hull (1943, 1952) was the most influential psychologist of S-R theorists. Pavlov and Skinner, however, are probably better known. Fundamentally there are two types of theory: classical and operant. The former consists of a neutral stimulant – in Pavlov's dog's case, it was the sound of the bell and unconditioned stimulus which was food on which the dog was fed. The dog salivated in response to the food (response) and if the bell sounded (neutral stimulus) just before the food was given (conditioned stimulus) the dog still salivated. If this procedure is repeated a number of times and then the bell is sounded without the meat being given, the dog still salivates (a conditioned response). In other words, the dog has been conditioned to associate the sound of the bell with the food. Considerable research has been conducted on classical conditioning since Pavlov's initial work and it has been replicated with other animals and with human beings, so that we can see that during this process some form of learning occurs.

Operant conditioning is slightly different – in this case, Skinner was concerned about producing desired behaviour and his work consisted of rewarding the correct response, immediately after its occurrence. Unlike in Pavlov's research, the response is voluntarily emitted by the subject, but only when it is the desired response is it one rewarded. The reward must follow immediately after the desired response, and it has been found that the subject learns to repeat the desired response voluntarily for as long as it is appropriately rewarded. Significantly in this case, the reward can be other-administered or self-administered: if it is other administered, then it is a technique of control; if it is self-administered then it might be either a matter of pleasure or even superstition. In a sense, however, the response precedes the reward, but this is the stimulus for subsequent behaviour.

In both forms there is an element of control – in the former the experimenter controls to provision of the stimulus and in the latter the experimenter may control the rewards (stimuli for subsequent behaviour). They are both theories of conditioning. In the latter, the reward (stimulus) is generally referred to as a re-inforcer and the approach is regarded as instrumental. But Skinner (1972) not only recognised it as such, he regarded his work as a 'technology of behaviour'.

Borger and Seaborne (1966, p.14) suggest that from this perspective, learning is 'any more or less permanent change in behaviour which is the result of experience'. That both forms of conditioning achieve the desired results is not disputed here, but what it disputed is that all learning can be reduced to behaviourism. Indeed, it is recognised that operant conditioning especially is a common phenomenon and sometimes a useful therapy in contemporary society. Consequently, our problem is not one of validity, it is one of explanation and analysis, and there are at least four areas that demand further discussion: the nature of stimulus, of reward, of method and of definition.

Stimulus and Reinforcement: In Pavlov's experiments the food was not given to the dog in total isolation, the experimenter was also present, and even if there had been total isolation, that isolation itself is a social situation providing a stimulus other than the food. In addition, the dog did not have all its past memories removed from its mind, so that there was an input, however small, from the dog's mind. While these may not be very pertinent to dogs, they are much more so when human beings are the subjects when both their social situations and their life histories provide additional stimuli, and so we can conclude that in classical conditioning there is actually never only one stimulus. This has been recognised and called sensory pre-conditioning (Ormrod, 1995, pp. 37-8) in which another neutral stimulus might also be affecting the outcome. This can also account for phobias, and so on, since other stimuli might have been learned without being recognised - these are what I have called pre-conscious learning in my own work. Consequently, the subjects' life history and the social situation in which the stimuli occur may also be provide additional stimuli by which the intended stimulus is construed and the experience from which the learning occurs transformed.

In operant conditioning, the subjects are freer but they are still people having life histories and are in social situations. Both of these might impinge upon their reasons for acting in the manner that they choose and so it might be over-simple to argue that one form of behaviour, even if it the desired one, has no other cause than the reward given. It could be argued that if there are other factors in the life history that are affecting the outcome, but it could be argued that this is still a form of operant conditioning since the reinforcer is still operating and has become part of the life history. Unless those other conditions are isolated, however, it is impossible to theorise adequately about the nature of reinforcement. Additionally, it might be argued that individuals sometimes act in the way desired by the provider of the reinforcement because of the power or influence being exercised by the giver of the reinforcement. This would not worry Skinner since he recognised that conditioning is technique of control. Indeed, the control route in the above diagram is learning by memorising (boxes 3→7→10).

We can see, therefore, that stimuli or reinforcements occur in many of these instances that may not be isolated from their environments; people construct their own experiences from the stimuli that they receive from their wider social situation. The stimulant provided by the experimenter is only one of contributory factors in the way that individuals construct their experiences, even if it is a major one. Consequently, the concept of stimulus has been insufficiently analysed and it is necessary to look at the interaction between boxes 1, 2 and 3 in the above diagram to understand the nature of the stimulation.

Response: Naturally the response has traditionally been seen in behavioural terms, but Ryle (1963) convincingly argued that it is false to separate behaviour from the accompanying

cognitive dimension. He showed that thought always accompanies action. If he is right, then the response to every responses contains a cognitive outcome as well as the observed response. In addition to the cognitive response, there might well have been attitudinal, values and emotional change and so on, and these cannot always be seen or measured. Indeed, amongst the highest forms of learning Greek thinkers placed contemplation, pure thought, and this may have had no behavioural input nor behavioural change as an output, so that behaviourism cannot account for contemplation. Fundamentally, it is the whole person that changes as the outcome of the learning (box 10) and this affects future learning experiences (box 1).

Methodological: Skinner's approach has been described as the 'psychology of the empty organism' (Borger and Seaborne, 1996, p. 77) which incorporates a methodological problem since the emphasis of the approach is based on behaviour, the thought processes were neither considered nor examined. But we are all aware that we think and so an important variable was omitted from the process. It might be argued that thought was not an important variable because we usually conform to what is expected of us. Nevertheless, we do have a sense that we are free to make another choice, even if we do not so. In addition, as Ryle pointed out, thought and action are one in many instances rather than cause and effect.

Even if the organism were empty, the observed behaviour still needs explanation sol that we cannot agree with Skinner (Borger and Seaborne 1966, p.78) that his approach is only technique. Data always need interpretation since facts have no intrinsic meaning. Underlying his work is a philosophy, one that led him to interpret his data in the way that he did. Consequently, we can see that the methods employed in his research suspect, so that we can also doubt the validity of the stated explanations for what he did, but this is not to doubt the data, that is the results of the conditioning process.

Definition: The behavioural definition of learning is 'a relatively permanent change in behaviour as a result of experience'. However, this definition is open to a number of criticisms. In the first instance we can see that learning is not the change in behaviour since this is the process whereas the change in behaviour is a product of a previous process and the process cannot be the product. This is not logically possible

Learning is also about transforming the experience (stimulus) rather than changing the behaviour as I have suggested in the definition mentioned at the outset of this paper. The change in behaviour is a result in the transformation of the experience. On at two counts, the behaviourist definition of learning is illogical and so it should be rejected, although behavioural learning is not rejected as we pointed out at the outset of this paper when we noted that we can learn by doing (boxes 3→5→6→9→7→10), but following Ryle, how-

ever, we have already cast doubt on the frequency that learning by doing actually occurs in isolation from learning by thinking and memorising.

Conclusion

From the foregoing discussion we can see that behaviourism has a number of flaws, which means that the original explanations need further qualification. It is the whole person in a social situation that constructs the experience from which learning takes place, and it is the whole person who learns. The behaviourist explanation might be valid in some instances within the context of the whole, but the weaknesses in methodology make it impossible to prove and the definition is illogical and should be rejected. However, every element in the behaviourist approach to learning can be incorporated into the existential model discussed at the outset of this paper.

We may conclude, therefore, that the behavioural explanation offers one way to understanding some forms of learning but the weaknesses in its analysis means that its explanations need further qualification and that it is better understood within a wider existential framework.

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THE PAST AND THE FUTURE OF MOTIVATIONAL RESEARCH: A REVIEW OF THE LAST 20 YEARS

Marko Radovan

Abstract

The purpose of the paper is to explore the development of motivational psychology from the mid 1970s until the end of 1990s. I chose this period because some research findings at that time happened to change the focus of the future motivational research in many ways. The seminal work on this area was Weiner's, who changed the focus of motivational research from needs and drives to cognition. In the paper an overview of several different approaches to the concept of motivation is provided and a number of issues is presented that indicate the trends in motivational research in the 1990s. They include the shifts: (1) from exploring interpersonal differences to exploring intrapersonal differences in motivation; (2) from passive to active definition of an individual; (3) from a study of isolated, decontextualized individuals, processes etc. to a study within a real-life social and cultural contexts; (4) from conceptions of cognitive, motivational or social aspects of learning in isolation from one another to multidimensional understanding of learning; (5) from mostly cognitive theories to theories that include emotions as an integral part of motivational and learning processes; (6) from predominantly self-report survey methods toward the inclusion of qualitative methods. In the paper the significance of those developments for the research in adult education is also stressed.

Introduction

Human motivation is a topic of constant, if not increasing concern in the educational psychology of youth and adult learning. Teachers, researchers and policy makers would like to understand and predict factors that influence learner's engagement in learning activities and their continuous motivation for the future learning. The concept of motivation is, according to Cropley (1980), defined as one of three indispensable components (characteristics) of lifelong learning. According to Cropley (1980) successful lifelong learning includes: "*... the skills necessary for learning (...), the motivation to carry out such learning, the image of one self as a learner, a positive attitude to learning, the ability to set goals and evaluate the extent to which they have been achieved, a realistic appraisal of one's own potential, a constructively critical attitude to oneself....*" (pp. 6-7).

The above definition assumes that if a person wants to be actively engaged in lifelong learning he or she has to possess a certain readiness for learning that is described with motivational and personal characteristics. But how can this "readiness" be fostered? In the history of motivational research there can be found many answers to this question. The opinions about the exact nature of motivation differ very much, but there is a general agreement that motivation includes (inherent or social) needs that are transformed in motives that direct our actions toward certain goals. The goal attainment consequently reduces the manifested need. This is a simplified description of the motivational process, but the means that can help to moderate and influence particular stages in motivation can be very diverse and depend on our current knowledge about the concept.

The purpose of this paper is therefore to explore the development of motivational psychology in the last two decades in which some crucial theoretical developments happened that changed the focus of motivational research in many ways. Although the majority of empirical studies that are presented in this article rest upon research in educational psychology, I am convinced that they can largely contribute also to adult educators.

The review of the accessible research reports will show the following characteristic of modern motivational research:

- Individual is defined as an active, information seeking organism.
- Cognitive, motivational or social aspects of learning are not studied in isolation from one another, but multidimensional understanding of learning is stressed.
- Motivation viewed as situated, contextual and domain-specific.
- Central role of cognitions, and a tendency to include emotions as an integral part of motivational and learning processes.
- Increasing application of qualitative methods.

Although it is hard to separately analyze these assumptions, I will try to explain the course of events that caused those changes.

Motivation – an early view

As noted by Sorrentine and Higgins (1986), most of the early research on motivation viewed student learning as separated cognitive and motivational determinants, and motivational theories were developed that distinguished between motivation and cognition. Rather then studying the interaction between motivational and cognitive processes, the argument was about which of the two was better at explaining the phenomenon of learning.
Weiner described motivation in this period by the following outline:

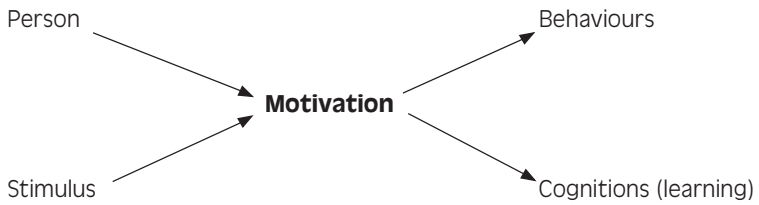

Figure 1: Classical motivational models (Weiner, 1974, pp. 97)

Figure 1 show a temporal sequence of events, where motivation is constructed from the traits or states of the person and different environmental stimuli. The environmental stimulus includes both the nature of the learning material and the incentives associated with performance. These independent variables are believed to influence the motivation of the learner. The degree of motivation in turn is related to different behaviours or cognitive processes. The cognitive process of greatest concern in education research is of course learning. The model presented in Figure 1 represents a guiding assumption about the motivation in that time: people are viewed as passive, their actions depend on their personal characteristics, and incentives provided by the environment (Weiner, 1974). The approaches that arise from this paradigm can be labelled as "motivate the learner". Methods are suggested to maintain the students' attention or to arouse enthusiasm so that the presented information is processed. Making the learning material relevant, meaningful, fun or interesting characterizes typical attempts to alter the stimulus situation so that the student is "motivated to learn". Rather than varying the learning, the environmental context is manipulated to arouse motivation. For example, competitive environments are established to promote excitement or co-operative groups are created to capitalize upon social motivations. In addition a person-stimulus interaction often is recognized and it is proved that different groups of individuals are motivated by different kinds of material or environments. Closely related to this approach are investigations that examine the role of reinforcement or incentives on learning. Here the task of the researcher or practitioner has been to uncover

the type and amount of external reinforcement that is most appropriate for a given population. Use of praise versus monetary incentive, teacher versus peer approval, positive (success) versus negative (failure) feedback, reward versus punishment and so on are typical experimental comparisons.

The seminal contribution to motivational research to come from the work of Bernard Weiner who argued that those with high or low need for achievement (he was referring to Atkinson's achievement motive) can perceive success or failure differently. Weiner's attempt to insert attributions into the achievement motivation formula shifted motivational research on to a new level, because suddenly the main concern became thoughts and meanings that vary with context.

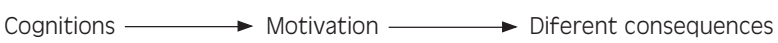

Figure 2: Cognitive paradigm of motivation (Weiner, 1974, pp. 101)

In Figure 2 we can see that cognitions (e.g. expectations, goals, values etc.), influence motivational processes. Motivation, in turn, affects both thoughts and actions that are related to different domains of psychological functioning. This conception broke the "mechanistic" view, and described a person as an active, information processing organism, seeking to understand his or her world. The integration of motivation and cognition was facilitated by the shift in motivational theories from traditional achievement motivation models to the development of social cognitive models of motivation. According to Linnenbrink and Pintrich (2002b), one of the most important assumptions of social-cognitive models is that motivation is a dynamic, multifaceted phenomenon. This means that the individual is no longer seen as "motivated" or "non-motivated", and that motivation cannot be viewed in a quantitative way that is characteristic of traditional models of motivation, but they stress that students can be motivated in many ways and that the main issue is to investigate why and how students are motivated to learn in different formal or non-formal settings. This is especially true of adult learners: »*To talk about persons not being motivated is to misunderstand the situation. They may not be motivated to learn what we want them to learn, but all adults are motivated to learn their own learning in their own way.*« (Rogers, 2002, pp. 95).

Cognitions as the central point in current models of motivation

This assumption implies the notion that it is not just social demographic, cultural variables and personality characteristics that influence individual's motivation, but rather active regu-

lation of motivation, thinking and behaviour that mediates the relationship between the person and the environment. That is, students' own thoughts about their motivation and learning play a key role in mediating their engagement and achievement.

This line of study involved a variety of cognitive constructs that were introduced that may facilitate or hinder the individual's motivation. The four main groups of variables that are currently present in motivational research are:

a. Self-efficacy beliefs
b. Causal attributions
c. Intrinsic motivation
d. Achievement goal theory

Self-efficacy beliefs. Self-efficacy is one of the central motivational variables that influence student achievement. According to Deci (Deci & Ryan, 1985) people have an innate need to feel competent over their environment. So it is not surprising that competence beliefs are a central part of most current motivational theories that presume that mastery over one's environment is an important need of human agency. Self-efficacy concerns beliefs about capabilities to do a task or activity and has been defined as individuals' beliefs about their performance capabilities in a particular context or a specific task or domain (Bandura, 1997). It is assumed that self-efficacy beliefs are situated and contextualized, so they are more situation-specific than similar concepts like self-concept or self-esteem. Although the role of self-efficacy has been studied in a variety of domains, a number of educational psychologists have examined how self-efficacy relates to behaviour in elementary, secondary, tertiary and adult academic settings (e.g., Bandura, 1997; Carré, 2000; Pintrich, 1999; Schunk, 1991). It was found that self-efficacy has been positively related to higher levels of achievement and learning as well as to a wide variety of adaptive academic outcomes such as higher levels of effort and increased persistence on difficult tasks in both experimental and correlational studies involving students from a variety of age groups. Self-efficacy was often studied also in the field of adult learning and proved to be an important predictor of person's motivation. Adults who are learning and can feel an actual sense of progress and real accomplishment usually persist longer in learning activities.

Causal attributions. Research based on beliefs that are studied within attribution theory, suggests that when a failure or success occurs, individuals will analyze the situation to determine the perceived causes for the failure or success (Weiner, 1985). Weiner (1985) identified the following four attributions that are most frequently used: ability, effort, task difficulty, and luck as the most important achievement causal attributions. These attributions were further categorized along two dimensions: stability and locus of control.

The stability dimension refers to the consistency of pattern of causal attribution, whereas the locus of control dimension, derived from Rotter's work, refers to students' beliefs as to whether the cause of success/failure lies within or outside them. Later, Weiner (1985) added a third dimension, controllability, to distinguish causes one can control (e.g. skill or competence), from causes one can't control (e.g. aptitude, mood, others' actions, and luck). According to Weiner causal dimensions influences different aspects of achievement behaviour. The stability of cause influences individuals' expectancies for success. If conditions (e.g. ability) remain the same, then an outcome should have a stronger influence on expectancies for future success than attributing an outcome to an unstable cause (e.g. effort). Weiner (1985) also argued that locus of control is - more than with expectancies for success-, associated with affective reactions like pride in accomplishment, self-esteem or self-worth. He argued that affective reactions depend on attributing success, whether to internal or external causes. If the causes of success are internal this should enhance pride or positive self-esteem; attributing failure to internal causes should produce negative self-esteem. He also proposed, like Bandura (1997) and Eccles et al. (1983), that expectations for success influence the individual's choice of subsequent achievement tasks.

Intrinsic/extrinsic motivation. According to Deci & Ryan (1985) intrinsically motivated learning is learning that meets people's need to be competent and self-determining. In self-determination theory Deci and Ryan (1985) distinguish between two types of motivation. They differ according to different reasons or goals that influence behaviour. The most basic distinction they make is between intrinsic and extrinsic motivation. Intrinsic motivation refers to doing something because it is inherently interesting or enjoyable, meanwhile extrinsic motivation refers to an activity as a means to an end; activity that leads to some other outcomes. Although intrinsic motivation is considered as the most favourable and important type of motivation, we can hardly say that most of our activities are intrinsically motivated. This may be to some extent true for early childhood, but with the years our conduct is more and more marked by social demands. This is especially true in the context of adult education. Thus it is important to note that Deci & Ryan differentiate between various types of extrinsic motivations, which represent different stages of agency that describes the degree to which our behaviour is autonomous.

One of the main components of intrinsic motivation is high personal interest in the task or activity. Similar to other constructs in motivation, interest is also multifarious and should not be understood as simply liking or not liking a particular task or domain. Interest theorists have distinguished between personal or individual interest and situational interest (Hidi, 1990; Hidi & Harackiewicz, 2000; Krapp, 1999). Personal interest reflects an individual's interest in a particular topic or domain (Hidi & Harackiewicz, 2000), and is thought to be

relatively stable over time and is partially a function of individuals' preferences as well as aspects of the task. In contrast, situational interest is based entirely on the features of the learning context and may be short term or long lasting (Hidi & Harackiewicz, 2000).

The final important cognitive dimension in the present motivational theories is goal construct.

Achievement goal theory. Goals are one of the most influential constructs within motivational research today (Murphy & Alexander, 2000), and are defined as guides of students' behaviour, cognition and affect (Ames, 1992; Ames & Archer, 1987; Dweck & Elliot, 1983; Maehr & Midgley, 1996; Urdan, 1997). It is assumed that there are two general goal orientations that concern the purposes individuals are pursuing when approaching and engaging in a task: mastery and performance goals (Ames, 1992). Mastery goals orient learners to "developing new skills, trying to understand their work, improving their level of competence, or achieving a sense of mastery based on self-referenced standards" (Ames, 1992, pp. 262). In contrast, performance goals are externally referenced and orient learners to focus on their ability and self-worth by outperforming others in competitions, achievements or grades, receiving public recognition for their performance and surpassing normative based standards (Ames, 1992). At first the concept of performance goals was viewed as a unidimensional construct, but recent research has demonstrated that linkage of performance goals and academic outcomes is not (always) consistent. It seemed apparent that the relationships between mastery and performance goals are not two opposite constructs but two constructs on the parallel continuums (Elliot & Harackiewicz, 1994; Middleton & Midgley, 1997). Elliot and Harackiewicz (1994) made a distinction between two different types of performance goal: an approach-performance goals and an avoidance-performance goals. Under the performance approach orientation students are primarily concerned to demonstrate ability. Under the performance avoidance orientation students are primarily concerned to avoid the demonstration of lack of ability (Elliot & Church, 1997).

(Re-)discovering academic emotions

Although cognitions are in the centre of modern motivational research there is an increasing concern with broader outcomes of education that also considers values, mental health, coping, and also emotions and affect. The important role of the affective domain in (adult) learning has been stressed in theory and in practice, because emotions are always involved in learning and make an important impact on learners motivation. How do emotions influence motivation? Reeve (2001) mentions the two-fold impact of emotions on motivation. Firstly, they serve as a "read-out" system that provides us with a report on how well or how poorly our motives were satisfied. In this view, emotions reflect the satisfied versus frus-

trated status of motives. Secondly, emotions can also be considered as a type of motives. They energize and direct our actions toward goals we set to our self. Following from these functions of emotions, it is assumed that emotions influence students' cognitive processes and performance, as well as their psychological and physical health.

At the present time, cognitive conceptions of motivation are still mainly focused on learners' thoughts and beliefs, although the times are changing (e. g. Linnenbrink and Pintrich's (2002a) model that combines goals and affect). Of course all motivational theories recognised the important role of emotions, but primarily the main fields of investigation in educational psychology were always cognitions of success, mastery, achievement etc. This is also true for Weiner's attribution theory that most directly addressed emotions. Emotions in this theory are linked to three dimensions of perceived causality: locus, stability and controllability. Thus, they are a result of cognitive analysis of success or failure. While there has been an increase in the research of the role of emotion in motivation in recent years, there is still a lack of examination of specific emotions that are linked to academic learning, classroom instruction, and achievement (e.g. enjoyment of learning, pride of success, or test-related anxiety). This means that a lot of questions regarding the role of emotions in the learning and motivational process remain still unanswered, and it is expected that in the future emotions will become an integrated element of motivational models.

Motivation – a composite situated in context

As we can see from the explanations made so far, it is significant that motivation is not a stable trait of an individual, but is situated, contextual, and domain-specific. In other words, this means that not only are learners motivated in multiple ways, but also their motivation can vary from situation to situation in the classroom or school. Hence, motivation is perceived as an inherently changeable process that is sensitive to the context, and it is argued that ecologically valid motivational psychology must include individuals "within wider psychological, disciplinary, social and cultural contexts" (Salomon, 1995, p. 106). As noted by Illeris (2003), all learning is characterized by the integration of an external interaction process between the learner and his or her social, cultural or material environment, and an internal psychological process of acquisition and elaboration. This statement is also congruent to Jarvis' observation that learning is not just a psychological process that is isolated from human environment, but is associated and affected by it (Jarvis, 1987). Salomon also stresses the term "composites" in describing learning of the individual in context, because "*... motivation of the individual and the learning environment, once broken down into their more basic elements such as discrete cognitive processes, motivational attributions, cease to resemble or represent the real-life phenomena"* (Salamon, 1995, p. 106). Salomon

(1995) further stresses that learner never interacts with isolated construct in the classroom, but with the "composite" of all aspects of learning environment. Further he points out that also individuals should be viewed as composites with their personal traits, abilities, attitudes, values, expectancies etc. that are not functioning in isolation but jointly. This means that in contrast to earlier views of motivation which considered cognitive, affective or social aspects of motivation in isolation from one another, current research emphasizes the need to develop models that integrate all mentioned components (e.g. Illeris, 2003; Jarvis, 1987; Zimmerman, 1998).

Different definitions lead to different approaches

The last and related set of changes in the motivational research in the last two decades involves methodological issues in terms of how to measure and analyze the earlier mentioned constructs. As we found out, the new generation of research stresses the "hot" nature of cognition that involves the inclusion of goals, expectancies, values and other beliefs, and as well emphasizes the situated and social processes that affect motivation to learn. To date, self-report questionnaires have been the main method used for studying issues of motivation, and have been used frequently to investigate the relations between contextual variables and individuals' beliefs, attitudes, and behaviour. This research provided some important findings, but on the other hand, self-report questionnaires do not permit an in-depth exploration of how individuals come to construct their own understandings within classrooms and schools or the role contextual factors play in the development of motivational beliefs and self-regulated learning. Consequently in the traditionally quantitative research paradigm in psychology, qualitative research methods are increasingly used to gain a better understanding of people's experiences and the meaning of these experiences to them, and the dynamic interplay between individuals and contexts (e.g. De Groot, 2002). These studies have revealed many aspects of motivation, how they relate to one another, and how they relate to outcomes of learning. The need to research the role of context in shaping students' cognitions and motivations is accompanied by the growing interest in social-cognitive, socio-constructivist, and sociocultural theories of learning, and the realization that, to be ecologically valid and practically relevant, our research must broaden its focus to reflect individuals acting within psychological, disciplinary, social, and cultural contexts (Goodenow, 1992; Salomon, 1995).

Conclusions

In this paper I have focused on five key developments in the motivational research that describe motivation as a holistic concept that involves interaction between thoughts, emo-

tion and learning context. In this vein learning is as a much social as it is an individual process, which is situated, culturally, and disciplinarily. The effects of social context, task design and structure on motivation are now understood in terms of mediating cognitions: not only cognitions of control and competence but also perceptions of purpose and meaning. Accordingly, it is inappropriate to label students as "motivated" or "unmotivated"; rather, adult educators are urged to consider ways in which the learning environment can be altered to enhance students' motivation that depends on a variety of motivational constructs including goals, affects, self-efficacy, attributions, and intrinsic motivation.

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TEACHER OF ADULTS – FACILITATOR AND MOTIVATOR OF ADULT'S LEARNING AND CHANGES

Sabina Jelenc Krašovec

Abstract

In my paper I am emphasising the role of a teacher in the process of learning and education of adults. The role of teacher in the learning process depends strongly on his/her philosophy, defining the role of various learning subjects and means (teacher, participants, learning sources) and organization of the process (use of learning methods, accepting adults as competent and independent learners, etc.), which results in different roles of teacher as a motivator. Teacher of adults can act in different ways such as stimulating critical thinking or obstructing it, liberating the participants or making them conform to the teacher, facilitating autonomy of thinking in the process of learning of adults, or breaking it.

Basic topics of my paper:

- *changing the role of the teacher and consecutively his activity as the result of the influence of a new trends in the process of teaching;*
- *the role of teacher in processes of learning, education and teaching from the position of enabling adult participants to become lifelong learners;*
- *teaching style and the style of leading groups as an important factor of facilitating independence and decision making in the process of the adult's learning (influence on learners behaving in the learning situation;*
- *impact of educational goals on defining the role of teacher;*
- *teacher of adults as a facilitator of further participation of adults in education in learning.*

Introduction

In today's society the individual is responsible for his/her own success: this is the message of some politicians, economists and educators – and it is already a little bit threadbare. If we would here emphasize such a stand point, that would mean recognising a principal of meritocracy in society and it would also mean that we consider most individuals as enlightened, capable of instant growth and able to learn independently and self-directedly. Only with such an interpretation is it possible to say that the individual is himself/herself responsible for constant learning and success.

It is apparent that, in contemporary society, the principal of meritocracy is not being achieved and it is impossible to gain, because we are facing the growing phenomena of uncertainty, inequality and poverty. The living conditions (together with economical, social, cultural and different other factors), influence very significantly the position and possibilities of the individual. It is impossible to imagine that equalizing of the individual's chances can be gained only through the existing school and educational system, which is remaining, more or less, unchanged and is all the time carrying the role of reproduction of distinctions between individuals.

It is stimulating conformist, non-critical unreflective learning which is accepted as the most appropriate way of learning, especially for children, yet as a logical consequence, also for adults.

In this situation, we can talk about losing the freedom of learning, since adults are not always aware of their own needs and interests. Needs and interests, which are imposed by the leading social structures, are very important influences also in the area of education. Learning can appear in different forms (Jarvis 1992), but the outcomes are either conformation or change. The greater part of learning, which is going on under the clearly set conditions in different educational institutions, contributes above all to conformism of the participants in setting educational goals. The goals are clearly defined, and they are suggesting to participants that they are learning what they want.

The school system with its strictly prescribed goals suffocates reestablishment of the creative and cooperative learning environment and impedes realization of the lifelong learning strategy; the results are adults, who didn't become lifelong learners, and are not prepared to learn independently. Many adults are weak learners and could not be responsible for their own personal growth, which can occur through reflective learning. They are also not prepared for independent learning and they accept the dominant role of the teacher as the natural one. Learning gaps and inequality between different social groups are increasing, and it is necessary to widen the spectrum of different learning possibilities, suitable for different learning needs of adults, with a different, motivational role of the teacher

of adults. Many theorists, such as P. Lengrand, B. Bernstein, I. Illich, J. Dewey, C. Rogers, etc., have realized decades ago that an important reason for the great need to develop new accession to learning, is not only the result of instant changes in society, but also the consequence of disappointment with traditionalism in the educational system (and its institutions), connected with teaching, perceived as a strong instrument of assimilation, conformism and rigidity.

In this situation it is most important to examine and value the role of a teacher in the learning situation – his/her role has to be changed in order to develop more capable adults, able to think critically and act according to that, as a result of learning in an anticipatory and innovative learning process. Teacher's role is undoubtedly important; the question is, first of all, how to define it.

In this paper, I shall be arguing that a teacher with his/her stimulating philosophy and teaching style could be an important motivational factor in most learning situations. I wish to illuminate the changing role of a teacher[1] in the learning process, his/her attitude to contents, organization of learning and learners. I maintain that personal growth of learners is mainly the result of their active role in the learning process, irrespective of the kind of education. I believe that a changed role of the teacher can help to improve the presently weak empowering potency of the existing educational system.

What kind of teacher do adults need, if any?

Adults learn not only in educational institutions but also in different learning settings (voluntary associations, societies, clubs, libraries, labour organisations, cultural organisations, etc.) or else they learn on their own. Although we suppose that many adults are capable of learning (self-directed) and are able to participate actively in the development of their own capabilities, they might still need help in doing so. The people helping them with learning have different roles and names; if they are not included in educational institutions, they are rarely called teachers, but more often mentors, tutors, instructors, trainers or simply facilitators. Their role is not the traditional role of the teacher, which means that it is less formal, the relationships are less authoritarian and more open; the learning climate is more likely to be creative, co-operational and positive. The "traditional" teacher, who is transmitting contents to learners, is - especially in adult education (but also in education of children and youth) - not desired. In the last decade we have been confronting the formulation "paradigmatical shift from education to learning" (G. Dohmen 1996), which means that at the heart of education there lies not teaching, but learning. The focus has moved from

1 In this paper I use the term »teacher« for different professionals, working with adults in different learning and educational settings.

what the teacher does to what happens to the learner. Of course the teacher is still present, but his/her role is different. That also means that the way of carrying out the learning process is shifting away from education, as a strictly planned and organised activity for transmission of knowledge; is shifting away from activity which is defined by "traditional" teaching and the formal relationship between teacher and learner; shifting away from very structured, institutionalised and supervised activity. It is becoming a learning process, initiated by the needs of the individual and based on life problem situations and experiences of adults. The learning process is less directed; this dramatically changes the role of the teacher. The role of the teacher depends strongly on the goals of learning or education[2], and also on other aspects influencing the process of education. Education is the organized possibility for learning, which is set by one party for another - in activity thus structured, the teacher is a very important element.

The role of the teacher in the process of learning

Different experts define different influential elements of education, which are interdependent and together create the learning situation. I shall present four elements of education, referencing to A. Rogers. Between those elements, teacher and his/her role is very important, because it connects and in a way influences the realization of other elements. Teacher is the element which re-establishes the learning situation, although learners later take over control of the learning process. Teacher should evaluate the needs of learners, set goals together with participants and suggest contents and learning methods, but still retain the authority. That means re-establishment of action, which will empower learners to learn in a way which suits them best.

Four elements of education are (Rogers, 1996: 41-42):

1. the teacher – agent;
2. the student participant;
3. goals and objectives;
4. methods/content.

1. *The teacher* may be at different levels of the educational process – at programme level and at class level the teacher/tutor.
2. *The participant/learner* – is the individual or a group, intentionally placed in the learning situation. Needs, characteristics and readiness to learn vary considerably between participants, so they have to be examined very strictly.

2 The purpose of this paper is not to define differences between learning, education and training, although they are very significant especially because of the goals and course of learning. I suggest that the reader connect the presented definitions with his/her own philosophical context. The presented findings are the result of different comprehensions about adult learning, based more on the humanistic and classical andragogical tradition.

3. *Goals* could be loosely or closely defined, but they do influence the learning process. In adult education in general, goals are defined more loosely than in education of youth, since the greater part of adult education appears as non-formal education. Very closely defined goals (for example in education of children and youth) with strictly defined standards of knowledge, restrain the freedom of the teacher in the process of teaching. Goals could be narrow or wide. Rogers (Rogers, 1996: 45) claims that "all structured learning opportunities can be seen once again as forming part of a continuum. At one end are those planned teaching-learning programs with narrow goals, the aim of which is to demonstrate that there is a "right" way to do something or other ". These are largely in the skill area, but that is also connected with right ways of understanding or behaving. "Choice is strictly limited and not encouraged - we speak about *training*. At the other end are all those activities that set out to convince us that there is a "right" way of thinking and feeling" (Rogers, 1996: 45). Choice is not encouraged, either; "there is only one way to think, one set of values and attitudes to hold" (ibid). Rogers calls this *indoctrination*. Between both ends is a large area of *education* with wide, loose goals. We could locate most of the adult education in this middle area, because development of choice is encouraged, many ways of thinking and doing are accepted, self-determination is encouraged. This way of learning is probably most suitable for the great part of adults, because they can value their viewpoints in the discussion with others while they are searching for their own ways of solving problems.

   For the teacher it is very important to declare in what kind of education he/she wants to teach and be part of. As a consequence, the teacher's stance towards participants, to contents and to selection of teaching methods, is developed.
4. *Methods/contents* – "the nature of the goals we set helps to determine whether the emphasis of our programme of work lies more towards content or toward method" (Rogers, 1996: 43). Methods and the content are closely related. Programmes with narrowly prescribed objectives tend to concentrate more on content than on methods (specified content should be covered); on the other hand, "programmes, aimed more at personal growth, confidence building, assertiveness, are less rigidly controlled" (ibid). The teacher in these cases feels it is more important to engage in particular activities – participative learning methods – than to cover a set amount of material; he/she is encouraging participants to enrol actively in the learning process, accept decisions about the program, its content and goals. Teacher is above all the facilitator and partner, and teaching is nondirective.

It is difficult to imagine that the purpose of education would be mostly teaching/training adults about certain skills or attitudes; every teacher should be aware of the opportunity

to encourage autonomy and a critical approach of adults in the learning group. The more active learners are, the more rewarding is learning. Learning is perceived more as a process which enables understanding and personal changing, which reinforces understanding of the social milieu and active participation in it and connection of new knowledge with personal conceptions and meaning. Learning is less and less comprehended as an accumulation and memorising of knowledge – quantitative enlargement of amount of knowledge (Marentič Požarnik, 2000). In the recent period, discourse is centred on two models of learning; the first is dealing with traditional ways of transmitting and accepting knowledge, the second with modern accession, based on needs of the individual, influencing the role of teacher and participants.

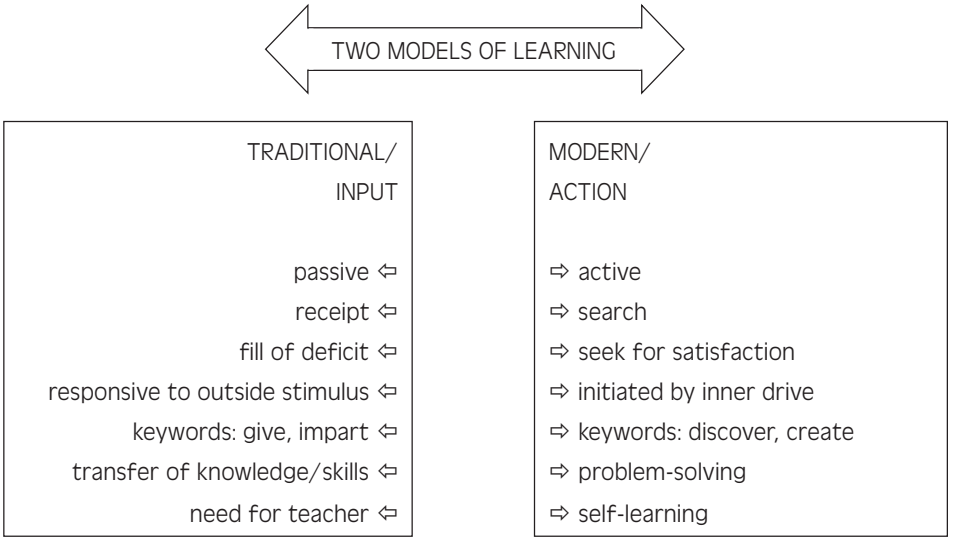

Figure 1: Two models of learning (Rogers, 1996: 78)

A changed perception of learning demands different relations between teacher and learners; exchange of experiences enrich the learning process.

The contribution of Carl Rogers was, beside his findings in the area of counselling, also important for the area of learning and education; his conceptions about learning and teaching are part of the efforts towards humanizing the process of education and enforcement of the lifelong learning strategy. He made some personal conclusions about learning and teaching (Rogers, 1995, Rogers, 1994):

- it is very difficult to teach anybody how to teach;
- learning, influencing behaviour, is the most important learning; it can be achieved through self-discovery and self-directed learning;

- results of teaching are mostly insignificant, but they can also be harmful;
- Rogers preferred to be "the learner", who can learn what is personally significant for himself;
- he was convinced, that the most successful learning is learning in groups, learning in relations with others and self-directed learning;
- the best way (the most difficult) way of learning is trying to understand why particular experience is important for someone.

Roger's thoughts suggest that the most successful learning can occur without teaching, yet with personal initiative, being experientially and problem based[3]. We also know, that much adult learning goes on in the group with a help of an expert. The question which should be raised is: what kind of help should teacher give to participants in order to facilitate their learning, thinking and critical perception? Is teacher's role teaching? Is teaching facilitating learning, motivating and help, or it is more or less transmission of knowledge and imparting of convictions? Is it possible to talk about neutral teaching?

The role of teaching in the learning process

Teaching is the way of promoting learning. Knowles (1980: 25) defines the expert's role as facilitator of change; with the help of an adult educator, learners will move from one pole to another: from low to higher maturation, from dependence to autonomy, from passivity to activity, from subjectivity to objectivity, from narrow interests to broad interests, from selfishness to altruism, from imitation to originality, from self-rejection to self-acceptance, etc. With the help of an adult educator, learners should become more capable of growing and changing.

We can define teaching very heterogeneously, also non-traditionally, and it certainly does not mean the authoritarian and directive role of teacher, though he/she has authority. I believe that in the process of education we need both, a teacher and teaching, but their role has to be properly defined and accepted.

Jarvis (1988: 120-126) talks about the teacher and teaching, which is connected with facilitating. Teacher should teach above all in a *socratic* and *facilitative* way; less *didactically (classical)*.

3 The well-known findings of Kolb about experiential learning emerged as a reaction to the unconnectedness between theoretical and practical components in the process of education and because of neglecting personal experiences in this process (Kolb, 1984: 70). He claimed that learning is a cycle process, which should involve:
- concrete experiences and understanding (on abstract-logical thinking),
- active experimentation in the outside world and inside value of reflective observation.
The qualitative process of learning is the complex of all typologies. Learning could start with concrete experience, which is followed by reflective observation and analysing of the experience, in the model of abstract concepts and experimenting of what is learned.

Didactic teaching is defined by Jarvis as a traditional concept of the teaching process. That's the process of making selection of knowledge, skill, etc. from the milieu and it's the process of transmitting it to participants by the use of some skilled technique. The participant should be able to reproduce that selection. *Socratic* teaching is defined as a method which incorporates questioning into the teaching and learning process. Learners are enabled to respond and express the knowledge, which they have maybe never crystallized in their own mind. Teacher should diagnose the students' needs and previous knowledge. Those experiences of participants have led some adult educators to regard themselves as facilitators of learning rather than teachers. Teacher, who uses *facilitative* teaching (the concept used also in experiential learning - Kolb), employs student-centred methods/techniques (rather than teacher-centred). This concept is the most useful concept for teaching adults, because it creates an awareness of specific learning needs in the students, confronts student issues requiring a solution, provides adults with an experience and encourages reflection upon it.

This classification shows us, that teaching can be interpreted very differently. Another classification (Fox in Marentič Požarnik, 1998a: 255-256) deals with subjective theories of teaching and teacher's role. Fox identifies four possible acceptations of teaching:

1. Teaching as *transmission* of topics/contents with techniques, adapted to the learner;
2. Teaching as *developing* learners' abilities and skills;
3. Teaching as a *journey* - *leading* the learner towards goals (emphasising autonomy of the learner);
4. Teaching as a *stimulation* of the learner's *growth* and *development*.

The first two definitions are simple comprehensions, while the last two are more developed comprehensions. Those two accept the learner with all his/her experiences, motives and expectations; such accession should be the basic mode of teaching adults.

To summarize, we can say that the role of the teacher of adults is less important, less active; on the other side learners have to be more active. Learning that way means action learning, which could be explicated by another dichotomy (Marentič Požarnik, 1998c: 24):

- if we consider learning as accumulation, retaining ➔ teacher has and "transmit" knowledge (teacher as delivery van) ➔ teaching is transmission (explanation and lecture methods)
- if we consider learning as active construction of meaning ➔ learner is active searcher (set questions, hypothesis; use his/her knowledge) ➔ teacher is mentor, partner, learning all the time ➔ teaching is live interaction (different learning and teaching methods, cooperation, problem based learning, dialog, experiential learning, etc).

L. M. Zinn (1990) defines five global accesses in the process of teaching (philosophies of education), which are very useful for explaining different ways of learning in different

educational institutions. In each philosophy the role of the teacher and the learner is clearly defined, but also corresponding to the teaching methods. Zinn cites that in past times, what was more important was a liberal, classical education, with the lecture as prevailing method, but also literature study and discussion. Today we are moving to more radical education, where more active learning methods are necessary, like experimental work, problem based work, learning contract, individualised learning, group work, dialog, etc. Also here we can see the changing role of the teacher, who is more coordinator and partner in variety of the adult's search for knowledge.

Consider the part of the scheme, which is interesting for the topic of this paper:

	LIBERAL ADULT EDUCATION (CLASSICAL, TRAD.)	BEHAVIORIST ADULT EDUCATION	PROGRESSIVE ADULT EDUCATION	HUMANISTIC ADULT EDUCATION	RADICAL ADULT EDUCATION (RECONSTRUCTIONIST)
PURPOSE	To develop intellectual powers of the mind; to make a person literate in the broadest sense-intellectually, morally, spiritually, aesthetically	To bring about behaviour that will ensure survival of human species, societies, and individuals; to promote behav, change.	To transmit culture and societal structure; to promote social change; to give learner practical knowledge and problem-solving skills.	To enhance personal growth and development; to facilitate self-actualisation.	To bring about, through education, fundamental, social, political, and economic changes in society.
LEARNER	»Renaissance person«; cultured; always a learner; seeks knowledge rather than just information; conceptual, theoretical understanding.	Learner takes an active role in learning, practicing new behaviour, and receiving feedback; strong environmental influence.	Learner needs, interests, and experiences are key elements in learning; people have unlimited potential to be developed through education.	Learner is highly motivated and self-directed; assumes responsibility for learning.	Equality with teacher in learning process; personal autonomy; people create history and culture by combining reflection with action.
TEACHER	The »expert«; transmitter of knowledge; authoritative; clearly directs learning process.	Manager; controller; predicts and directs learning outcomes.	Organizer; guides learning through experiences that are educative; stimulates, instigates, and evaluates learning process.	Facilitator; helper; partner; promotes but does not direct learning.	Coordinator; suggests but does not determine direction for learning; equality between teacher and learner.
METHODS	Dialectic; lecture; study groups; contemplation; critical reading and discussion.	Programmed instruction; contract learning; computer-assisted instruction; practice & reinforcement.	Problem-solving; scientific method; activity method, experimental method; project method; inductive method.	Experiential; group tasks; group discussion; team teaching; self-directed learning; individualized learning.	Dialog; problem-posing; maximum interaction; discussion groups.

Figure 2: Philosophies of adult education (Ellias, Merriam, & Zinn, 1990: 76-77)

It is very natural that teacher's work is influenced by many different determinants, especially by his/her beliefs about the elements constituting the process of learning. Looking at the scheme of philosophies of adult education we can easily imagine how differently the teacher can accept his/her role in the process of learning and, also depending on that, the role of participant and the procedure of learning.

Those determinants we can entitle *philosophical orientation of teacher* (Apps in Zinn 1990); it depends on teacher's values, beliefs, stands and decisions. Apps is convinced that teacher's beliefs intervene in five areas, important in the process of education:

- beliefs about adults as participants in adult education;
- beliefs about overall purpose and goals of adult education;
- beliefs about contents or subject matter – what is to be learned and what are the sources of content;
- beliefs about the learning process – how adults learn, how learning should proceed;
- beliefs about the role of the adult educator – teacher of adults.

Marentič Požarnik (1998a) similarly talks about subjective comprehensions and their connection to more complex subjective or implicit theories about teacher's own activity, about learning and teaching. Many researchers are convinced about the important role of those comprehensions in teacher's decisions in learning and teaching situations and consequently learning results (Marentič Požarnik, 1998a: 246). Learners are entering learning influenced by teacher's behaviour, modelling their own learning style in connection with that; it is expected that such learning will mirror teacher's influence.

Most teachers have a combination of two or more philosophical orientations; knowledge about them is important, because teacher can improve his/her activity in the learning process, change it, strengthen communication and team work with learners and colleagues. Teacher's reflection about five different areas, questioned by philosophical orientation, which means that one weighs up better one's role in the process of learning, role of participants, relations in the group and possibilities to make them better. Teacher's philosophical orientation is connected with the way of planning a learning session, performing and evaluating learning. Social structures with their claims about desired results of learning are also important aspects, which influence the action of teachers.

Teacher's philosophical orientation has a strong connection with **teaching style.** It reflects "qualities displayed by a teacher that are persistent from situation to situation regardless of the content" (Conti, 1990: 80); it is also broader than the teaching strategies. It reflects an atmosphere, created by a teacher and "cannot be determined by looking at one isolated action of the teacher (ibid: 81).

We can identify two basic modes of teaching, which are defined by those characteristics[4]:

TEACHER-CENTERED APPROACH	LEARNER-CENTERED APPROACH
currently the dominant approach throughout all levels of education in North America (also in other countries), related to the ideas of Skinner; also in adult education	strongly supported in the field's literature; connected to ideas of A. Maslow and C. Rogers (potential for individual growth is unlimited)
learners are passive, they become active by reacting to stimuli in the environment	individuals interact with their surroundings
humans are controlled by their environment; schools are social institutions, which have the responsibility of determining and reinforcing the fundamental values	behaviour is the result of personal perception; motivation results from people's attempts to achieve and maintain order in their lives
teacher's role is to design the environment which stimulates the desired behaviour	learners are proactive; their experiences play an important role in learning
learning is defined as a change in behaviour; outcomes are often defined as competencies.	education focuses upon the individual learner rather than on a body of information; helps students develop a critical awareness of their feeling and values
	learning – acquisition of problem-solving skills, enhancement of the self-concept development of interpersonal skills
	the central element is trust

Figure 3: Teaching style (Conti, 1990: 81-82)

Teachers do not select their learning style and also don't change it constantly. Their efficiency depends on the learning and teaching situation.

4 We can evaluate Teaching Style by PALS (Principals of Adult Learning Scale), author Gary J. Conti: Identifying Your Teaching Style. Conti 1990.

Those comprehensions are not exceptional; Carl Roger made a comparison between traditional education and person-centred education, which are two poles of a continuum. Differences between both approaches, which reflect also the role of the teacher, can be resumed to a few findings (Rogers, Freiberg, 1994: 210 – 213):

THE TRADITIONAL MODE OF EDUCATION

- *The teacher is the possessor of knowledge, the student the expected recipient; there is a great difference in the status level between them.*
- *The major methods of getting knowledge into the recipient are the lecture, the textbooks or some other means of verbal intellectual instruction; the examination measures the extent to which the student has received it. These criteria are the central elements of this kind of education.*
- *The teacher is the possessor of power, the student the one who obeys.*
- *Rule by authority is the accepted policy in the classroom.*
- *Trust is at minimum (teacher's distrust of the student, student's lack of trust in the teacher's motives, honesty, fairness, competence).*
- *The students are best governed by being kept in constant state of fear (fear of failure; it increases as we go up the educational ladder).*
- *Democracy and its values are ignored and scorned in practice; students don't participate in choosing the goals, the curriculum or the manner of working.*
- *There is no place for the whole person in the educational system, only the place for the intellect.*

THE PERSON-CENTERED MODE OF EDUCATION

- *Facilitative leadership has a ripple effect. Leaders who facilitate others are themselves facilitated.*
- *The facilitative teacher shares with others the responsibility for the learning process.*
- *The facilitator provides learning resources from within himself/herself and his/her own experience and from books, materials, or community experiences.*
- *The student develops his or her own program of learning, alone or in cooperation with others; learning climate is facilitating; learning from each other is important.*
- *The facilitator focuses on fostering the continuing process of learning; the content of the learning is often on a secondary place, important is progress in learning how to learn.*
- *A student reaches personal goals through self-discipline.*
- *A student evaluates his/her own learning (with feedback from the group and facilitator).*

- *Learning in a growth-promoting climate tends to be deeper, proceeds at a more rapid rate and is more pervasive in the life and behaviour of the student than is learning acquired in the traditional classes.*

Researching of the area shows us that by decreasing the dominant role of teacher we can encourage learning for enabling adults for independent problem solving. With regard to the experiences of adults, teacher can create a cooperative discussion arena, where critical thinking (on the area of formal knowledge), critical reflection (in the area of self) and critical action (in the area of world and society) is possible (Barnet, 1997).

In such conditions the learning group is changing. Freiberg defines differences between passive and active learning groups as a result of traditional versus person-centred mode of education (Freiberg, 1992 in Rogers, Freiberg, 1994: 10). In a passive group, learners are "as tourists", work by themselves, seldom participate in the group and seldom discuss the reasons for their answers. Despite teacher's control of the discipline, learners are usually late to class. On the other hand, an active learning group behaves as a group, where students do small-group projects and create new ideas and material through different projects. Learners are cooperative, also take the initiative to interact with teacher and colleagues, talk aloud about the way they derived answers, and create a common discipline rule.

Different findings indicate the importance of teacher's philosophical orientation or subjective comprehensions, based at one time on the personality of the teacher and also on claims and anticipations of society and the educational system. Despite requirements for reestablishment of a different learning culture and consequently better learning results of youth and adults, it is difficult to change stances about the role of a teacher. As long as the main goal of education remains above all acquiring as much knowledge as possible, and other aims of education and learning are denied, it is illusory to expect altering the role of the teacher.

What kind of strategies can emphasise the motivational role of a teacher?

By acknowledgment and recognition of different aims of education, the traditional role of the teacher should be modified. This process is multilayered; for reaching quality, non-traditional teaching should include several steps. It is necessary to:

- stimulate teachers for personal and professional growth; "inner" and "outer" learning, which should be connected in integrity, including the whole person – equilibration of professional and unprofessional parts of life, equilibration of personal development and privacy; possibilities for teacher's intellectual and social development (education for un-

derstanding, team work, cooperative learning) and permanent advancement of cognitive skills;

- provide continual professional teacher's education, which influences the advancement to a higher level of professional development[5];
- enable teachers to understand and respect findings about the influence of a different teaching style on the quality of work in the group;
- stimulate teachers to take into consideration different cognitive and learning styles of participants and use appropriate and variegated teaching methods and techniques;
- empower teachers to use different learning sources and open the learning situation, which stimulates problem based learning, critical stance for acquired knowledge and lifelong learning and lifelong education;
- stimulate teachers to introduce meta-learning: learning how to learn;
- encourage fruitful discussion about the expectations of the further development of educational and learning possibilities (the system in the whole, the role of the teacher, results of education and learning, different needs of children, youth and adults, developmental needs of society, etc.) within professional groups (education and adult education experts) and also in civil society.

Conclusion

Growing and becoming are the most important goals of human personal development. We all remember R. Kidd's formula B × B × B – being, becoming, belonging. That means, that education of adults should stimulate learning for growing and becoming. But on the other hand, most of the educational provision for adults, governed by the state, is still oriented traditionally - like initial education - and reinforces non-reflective learning, thus emphasising the traditional role of the teacher.

If we want to move educational theory and practice towards more open and heterogeneous aims, with the purpose of also introducing some fundamental social, political and economic changes, we have to do so first by rethinking the idea of education and adult education, its aims and desired results, and consequently by changing the concept and its imple-

5 Kugel formed a model of professional development of teachers, which has three levels (Marentič Požarnik, 1998b: 35):
- on the first level, teacher is oriented to himself/herself;
- on the second level, teacher is oriented to profession, fields of activity – he/she is trying to »cover« learning content as well as possible (reaching goals, set in the program);
- on the third level, teacher is more and more oriented to students/learners:
  - first on their abilities to learn and accept knowledge,
  - then on ways of successful learning (he/she organises the discussion, group work, etc),
  - finally to learners' independence – teacher creates conditions for learners to accept responsibility for their own professional development.

mentation. As a result, the role of the teacher will change and simultaneously also the methods and results of teaching.

On the other hand, however, change can only be successful when it comes from individuals. When the number of creative people is large enough, organisation and society will change. Learning is the catalyst of changes, also with help of the right teacher – facilitator and coordinator of learning. The question is – do we want change?

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ADULT PARTICIPATION IN DREAM SOCIETY: IMAGES OF ADULT EDUCATION

Jyri Manninen

Abstract

The article will show what kinds of different images adults may have considering some central words and concepts used in adult education. It is assumed that these images strongly influence the decision making processes and therefore also participation in adult education. The qualitative data show that even the common words such as learning and adult learning may have rather different images in people's minds, which can be especially negative when lower educated people are in question. The original study (Manninen et al., 2003) analysed also the connection between images and lifelong learning paths, and there is a direct connection between the negative images and passive participation history.

Theoretical framework

Participation models

Participation in adult education has been an actively researched area during the past 30 years. Adult participation has been researched mainly from three perspectives. The **psychological** approach seeks explanations from individual attributes such as motives, traits, genome, personality, early childhood school experiences etc. (eg. Garrison, 1987). The **sociological** explanation model is based on characteristics of the society, policy, work organisations, qualifications etc. (eg. Rinne et al. 1992). A more **interactive** model suggests that participation is a socio-psychological process of interaction between the individual and the external environment (eg. Rubenson, 1979), as shown in the model below.

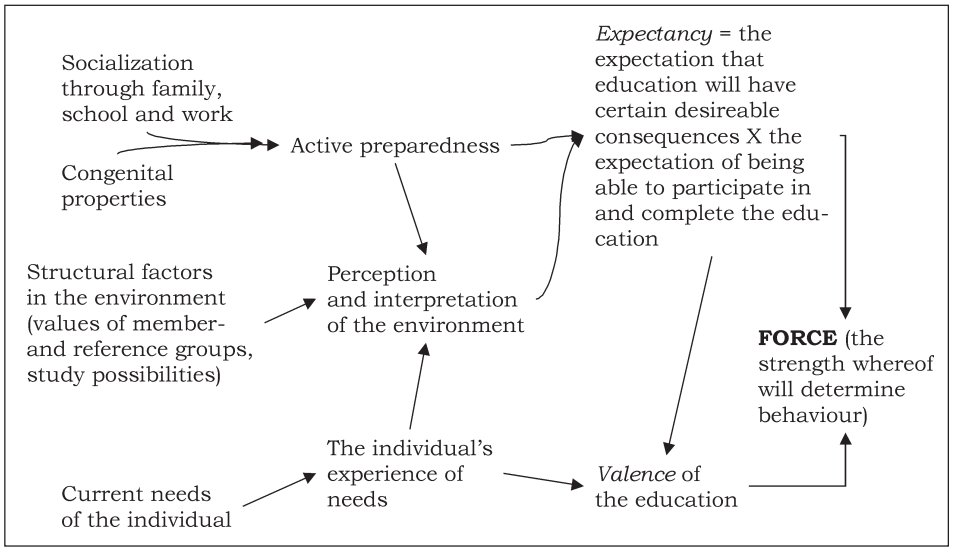


Figure 1. The expectancy – valence model (Rubenson, 1979)

As the expectancy – valence model above suggests, participation is seen as a function of early childhood experiences (home, school), current learning needs and the environmental factors (for example, study possibilities). The actual decision making process is made by the individual, when s/he weights the expected outcomes, his/her ability to complete the training and the overall felt usefulness of the participation.

Even though this interaction approach combines both psychological (individual traits and personality) and more sociological explanations (structural factors, work), it is still unable to explain how those "who should not participate in theory" actually break the rule and become active adult learners. Even though the statistical correlation between adult learning activity and educational level is clear, the relationship is not deterministic. On the con-

trary, in the group of workers in Finland 43 % of men and 48 % of women had participated in adult education during the last 12 months. Even though these numbers are lower than respective numbers in higher white collar groups (82 % and 86 %), there is still almost half of the lower educated who actively participate in adult education. (Statistics Finland, 2002). Therefore it is assumed that current theoretical models of participation need to be elaborated further in order to deepen our understanding of this complex phenomenon. More research is needed from different perspectives, in order to understand the post-modern nature of participation and non-participation. This study suggests that a fourth, **postmodern explanation model** could be developed to understand the postmodern nature of decision making processes. In this model, the individual is seen as a consumer, whose decisions are more or less based on images and feelings and less on facts and rational reasoning.

This article will show what kind of different images adults may have considering some central words and concepts used in adult education. It is assumed that these images strongly influence the decision making processes and therefore also participation.

A fresh perspective – images of education

In this paper the theoretical perspective is based on the assumption that in post-modern society decisions on participation are based more or less on the **image of education** that individual have created in their minds. This approach has been adopted from marketing and imago management literature (Karvonen, 2000). Image can be defined as a ***personal conception of reality***, or as 'a set of attitudes, thoughts, observations and beliefs' concerning the object or issue in question (Nimmo & Savage, 1976; Karvonen, 2000, 41).

Images have become more important, because in the postmodern society people are looking for **experiences,** and decisions are more often made based on 'soft' values and feelings. The concept of a 'Dream Society' (Jensen, 1999) is based on the assumption that, for example, consumer behaviour is nowadays based more on emotional issues and feelings than on quality, facts and reliability. As proposed by Jensen (1999), in 'Dream Society' images, stories and shared experiences become more and more important as sources of reality construction. For example, in a recent analysis (Manninen & Onnismaa 2001) friends and work-mates were found to be the most important source of primary information about adult learning opportunities; 31.4% heard about the training from their friends (19.6% from a handout, 15.7% from www-pages, 5.9% from newspapers).

Images of learning and training act as mediators of motivation and participation. They are likely to influence the way individual adults perceive the available learning and training opportunities. Even more important is the influence these factors are likely to have on indi-

viduals' readiness to receive any information concerning adult learning opportunities. Those who have positive conceptions and attitudes towards adult education and who attach positive images to adult learning are more likely to spot marketing campaigns and read leaflets. The theoretical concepts and their relation to participation can be summarised as shown in the next model:

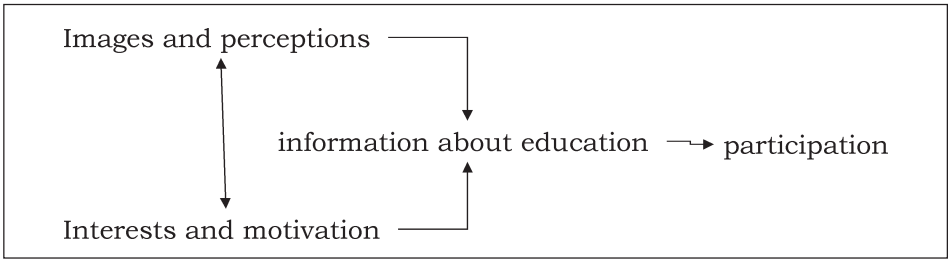


Figure 2. Images of learning and training as mediating variables

Even though this paper concentrates on a narrow and single element (images of education and training) in a complex system of interacting elements predicting motivation and participation, it is acknowledged that the actual decision making process individuals go through is far more complex and multidimensional. Advanced theories of motivation and participation all include various complex concepts and the interaction processes between them. Therefore images play only one role in the process, but - as suggested in this paper - a crucial one.

The role of images in the theoretical frameworks of motivation and participation research

The key question (why do adults engage themselves in learning activities and why not?) can be analysed using two different but overlapping theoretical frameworks, which are *theories of motivation* and *theories of participation*. Even though these both deal with the same phenomena, the emphasis is a bit different. The general definition of 'motivation to learn' is "*an individual's desire to work towards a learning goal. The motives which are the basis for the learning desire activate, direct and maintain the learning activity*" (Ruohotie, 2000, 8). Participation, on the other hand, deals with the processes which make people participate in organised training situations. Even though motivation for training is a bit wider concept than participation for training, these are overlapping concepts and therefore the long tradition of participation research can provide a fresh perspective on motivation research, especially when aims, objectives, obstacles and barriers to participation are analysed.

Images of learning, education and training play a mediating role, for example in the so called socio-constructive models of motivation (Pintrich, 1988), especially in its applications within vocational training (Ruohotie, 2000; Pintrich & Ruohotie, 2000). According to Pintrich's motivational expectancy model (1988), the components of motivation are: Learner goal orientation, Learner efficacy control and outcome beliefs, Perceptions of task difficulty, Task specific perceived competence, Test anxiety and affect self-worth, Task value, Expectancy for success and, finally, Achievements (learning, results, marks etc.). Many of these components depend on the image the person has about training, for example Learner efficacy control is based on the image one has about adult training situations. Especially lower educated and less experienced adult learners depend more on prior schooling experiences and related images, which therefore play a central role in their motivation.

In a similar way the key concepts from participation research are related to images, especially those based on the interaction approach (cf. Cross, 1981; Rubenson, 1979). These models usually employ less influential (see Cookson, 1986) background variables (for example, prior schooling experiences and congenital properties, Rubenson, 1979) and more situational and relevant variables, such as valence – expectancy –analysis made by the individual (Rubenson, 1979; compare Pintrich, 1988). Expectancy is in many ways based on the images the person has about his/her learning abilities and the usefulness of education and training in general.

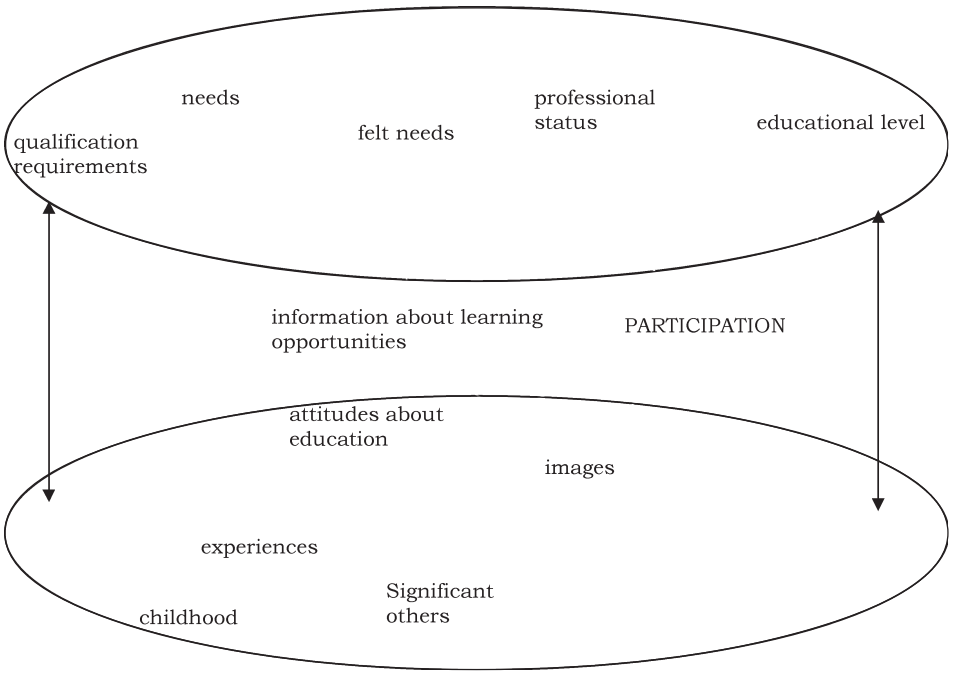


Figure 3. The complexity of the theoretical framework

Some sociological models of participation (like Lehtonen & Tuomisto, 1972) emphasise the availability of information as one of the key factors in the participation process. Unless the person in question has no access to or no interest in receiving information about training opportunities, the participation is less likely to take place. As shown in model 2, this paper is based on the assumption that images modify, screen and direct attention and perception, so that those who have positive images about learning and training are more likely to receive information about training opportunities, and vice versa.

The complexity of explaining factors is described in the model below. The model is based on the interaction approach, so that some of the sociological factors are described in the upper ellipse and the more psychological factors in the lower one.

This study is based on the simplified setting where only images are analysed. The hypothesis is that these images are modified and created - among many other things - by experiences, rumours and stories told by significant others (friends, work mates etc.), by information and marketing, and by previous participation etc. Images, on the other hand, influence the attitudes, information seeking behaviour and actual participation.

Empirical analysis

Data and methods of analysis

This paper is based on a research project where qualitative data is used to analyse what kind of images adults with different educational backgrounds have about learning and training (Manninen et al., 2003). The shorter, selected data used in this paper will show what kind of images adults have about (1) the relationship between age and learning, and about words, (2) "Lifelong learning", and (3) "Adult learning"[1] - two central terms usually used in marketing, in political programs and in documents.

Phenomenography (Marton, 1988; Marton et al., 1993) and discourse analysis (Silverman, 1993) will be used as methodological tools for this study. The empirical qualitative data are based on interviews (n = 24) and on analysis of open questionnaires (n = 134). All informants were Finnish adults aged between 21 and 64 years, with different educational backgrounds and levels of formal training. Both sexes were equally represented in the data.

The images people have about the *relationship between age and learning* will be analysed using the data from interviews (n=24) and from the open questionnaires (n = 134). The data were collected using the method similar to qualitative attitude research (Billig, 1989); the informants were given a statement and were asked first whether they agree or disagree with the statement, and then invited to justify their attitude. The analysis was done

1 The Finnish term used in the interviews was "Aikuisopiskelu", which can be translated also as "adult studying", "studying something when you are an adult".

on the arguments, which in this case were given orally (interview) or in written format (open questionnaires). The statements in this case were learning-related proverbs, such as 'You can't teach new tricks to an old dog', which is used in this paper.

The data for images concerning "*Lifelong learning*" and "*Adult learning*" are based on interviews (n = 24), where the informants were simply asked to tell what kind of image these words bring to their minds. Images of "Lifelong learning" were analysed using discourse analysis, images of "Adult learning" were analysed using phenomenography.

"Lifelong learning" – the conflicting discourses

Discourse analysis was used to point out different ways of speaking about "Lifelong learning". These ways of speaking reflect the different images people have about the term and phenomena.

Two image categories were found in the data; firstly, the phrases were either dealing with the term in itself ("Good new word") or with the phenomenon ("eternal studying"). The second category was positive – neutral – negative –dimension. Negative phrases were more often term-based, whereas positive and neutral phrases were based on the phenomenon in itself (learning throughout life). Negative images were based on the administration originated purposes people felt to be behind the use of the term.

The analysis shows that the message of 'joy of learning' offered by society does not reach all citizens for whom the meaning of "Lifelong learning" is more that of a government and labour–originated obligation or even a forced activity.

The analysis was continued by defining whether the phrases discuss informal, nonformal or formal learning situations, how motives for learning were defined (willingness to learn, part of everyday life, forced by circumstances), and who was the actor (I or me, they, people, the young).

An example of different actors in the phrases is given below.

Through experiences one learns automatically [Passive]

…when I myself are nearly middle-aged [Me, I]

…also old people can learn [They]

…but I guess they sometimes go to work as well [Third persona]

Differences were also found as to whether the informant based his or her image on formal training (o*ne can study at the University at old age as well*) or informal, everyday learning (*rest of life you then study at the school of life*).

An example of positive, neutral and negative images is given below:

POSITIVE: *You can learn even when you are retired. Or throughout the whole life. A person can never say that I don't need. It's good always.* (Interview 19, female, 58 years old, basic schooling, worker)

NEUTRAL: *Old people, even though it means whole... also old people can learn, studying even when you are older.* (Interview 22, female, 29 years old, masters degree, white collar)
NEGATIVE: *It's a somewhat invented term, not necessarily fulfilled in practice. Cliché, theoretical term, it just sounds stupid* (Interview 2, male, 36 years old, grammar school, blue collar)
The following table summarises the main differences between the images concerning "Lifelong learning".

Table 1. Comparison of different images concerning "Lifelong learning"

"LIFELONG LEARNING"			
The nature of images	***Positive***	***Neutral***	***Negative***
Images based on...	- Positive learning attitude, joy of learning, learning as an opportunity - Formal and nonformal training emphasized - Need for learning remains throughout life - The way of speaking: passive or "I"	- Everyday learning requirements - Self-evident - Learning as automatic everyday activity - Staying in the schooling system in different stages of life - The way of speaking: passive, third person ("they"); external actors (pensioned people, young people, "the people")	- Centralized management - Cliché - anxiety, obligation, labour market driven - The way of speaking: conceptual level, "the people"

Those who have **positive images** about "Lifelong learning" represent the group of informants whose attitudes towards training and education are positive. They connect more often learning to formal and nonformal training settings, and they consider the lifelong existence of learning needs and training opportunities as natural. They also use "Me" and "I" forms in their expressions, which makes the images more personal.

Neutral images are based more on informal learning and on self-evident everyday learning needs. Lifelong learning is seen as a natural characteristic of existence, or as a response to everyday challenges. The way of speaking is passive, and especially if formal training is mentioned, also third person (They, the young people), which reflects the fact that this is externalised, something relevant for other groups of people but not for us.

Negative images are related almost solely to the term in itself and to its nature as an issue raised by central administration and by labour market organisations. Especially the

origin in labour markets raises images which relate to obligations and forced participation. There is also some doubt about the linkage between speeches held at celebrations and in people's everyday routines – whether the good principles are ever fulfilled in practice. However, the negative image is related to the use of the term, not to the actual activities such as learning and studying.

As a conclusion we can say that those who have positive image about Lifelong learning see it as a natural part of one's own life and studying. Also those who have neutral image, have in principle a positive attitude concerning learning and studying, but they don't consider it as a currently or personally relevant activity. Studying is seen as an activity suitable for others, more eager groups of people (retired or young people), and learning is seen as an informal activity taking place in everyday life. Negative images, on the other hand, seem to raise only questions and comments concerning state policy and centrally led campaigns, in the practice (learning, studying) in itself negative images don't seem to have a direct influence. One may ask, though, whether negative images related to the term have influence on the effectiveness of marketing campaigns.

Age and learning – can't teach the old dog new tricks?

As described earlier in this paper, the informants were given the old proverb "you can't teach an old dog new tricks"[2], and asked whether they agree or disagree with this proverb, and more importantly, how they justify their standpoint. The actual phenomenographical analysis was based on these arguments (n = 24 interviews and 134 written statements). The key words and expressions in the data were identified and categorised according to similarity and theme.

Some examples from the data are shown below. The key words and expressions identified in these examples are highlighted in bold:

*You can always learn something new, if you only have a **desire** to do so.* (Questionnaire 1078, female, aged 29)

*It all depends on own **will, motivation**.* (Interview 13, male, aged 61)

Learning at an older age seems to require patience and hard work. From teacher it is expected to receive support, patience and suitable teaching methods.

*[..] the courses and teaching have to be a bit **different**. It is done on their **own rules**. From my own experience I know that older people or seniors are very **motivated** students. When they start to study, they are really motivated and **eager**.* (Interview 24, male, aged 36)

2 The Finnish format of this proverb is directly translated "Old dog can't learn new tricks", therefore the results tell more about the learning of older adults than about teaching.

The main categories identified in the data (differences to learning of younger people, supporting elements, must have –class and requirements) are described in Model 4 below.

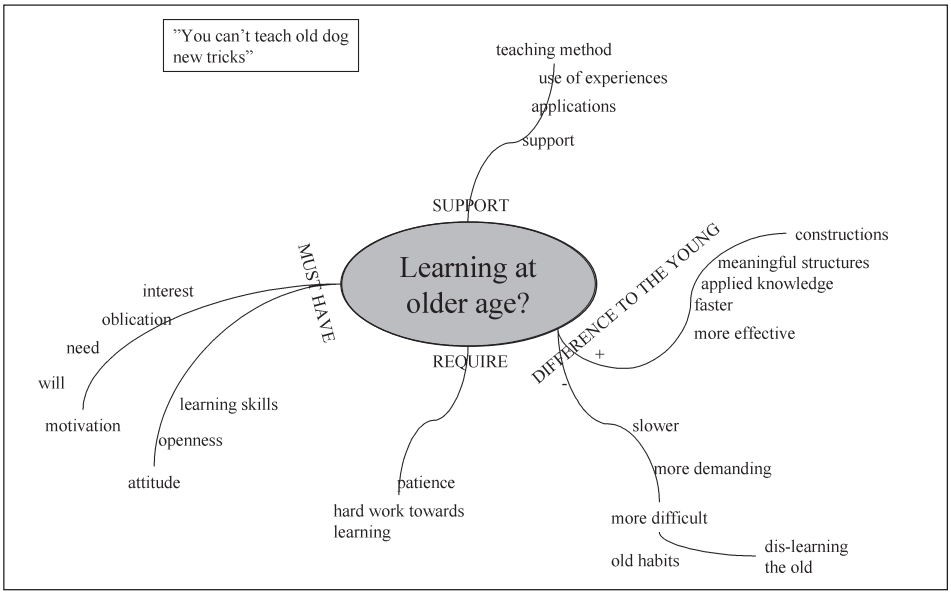


Figure 4. Image categories about learning at older age

Adult learning" – Tough and liberating experience?

It was rather common to have an image that 'adult learning' takes place during the evenings after working hours, as the following examples show:

My cousin is an adult learner. It is quite tough, since you have to study and work simultaneously. It takes evenings and weekends. I admire them. Myself, I have chosen day time studies. And only after that I move to the labour markets. (Interview 4, female aged 26).

My first image is that someone's studying after work during the evenings. (Interview 16, female, aged 36).

Model presented in the Figure 5 summarise the main categories and images related to "Adult learning".

Images include the conception that adult learning is hard work after working hours, which in the worst case takes in also weekends. Learning is seen as a demanding and tough activity. Adult learning is also regarded as an activity suitable for older people ("*over 40 years old*") if they want to advance in their career or learn a new profession. There are some positive images as well, which include the positive outcomes such as joy of learning, usefulness, and meaningfulness in general. An interesting detail is the rather concrete image of adult learner as an "Enthusiastic Aunt-person, who starts a new course again".

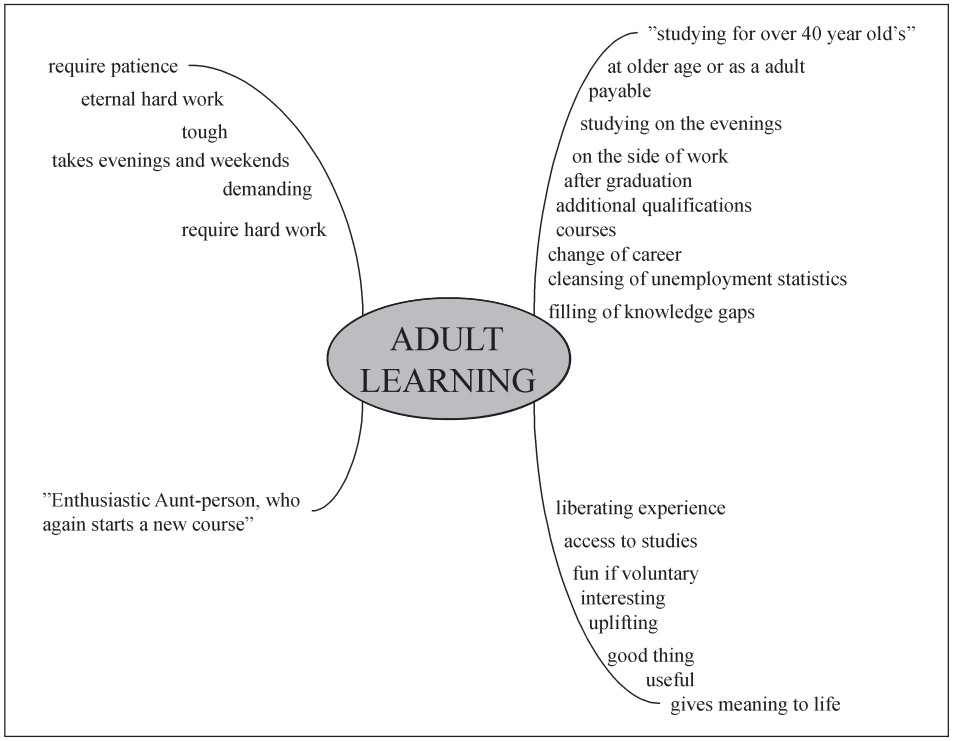


Figure 5. Images of "Adult learning"

Epilogue – Flying cows

The data show that even the common words such as learning and adult learning may have rather different images in people's minds, which can be especially negative when lower educated people are in question. The original study (Manninen et al., 2003) analysed also the connection between images and lifelong learning paths, and there is a direct connection between the negative images and passive participation history.

The paper also described how the common political key term "Lifelong learning" can have either negative images (*use of term*) or neutral images (*good as an idea, but doesn't concern us*), which don't motivate people to participate learning activities. Partly we can blame European Commission, which has outlined the modern 1990's objectives for Lifelong learning from the viewpoint which emphasise more the needs of the labour market and develops the competitive edge of European enterprises. Even some textbooks define 'Lifelong Learning' as a synonym for 'Lifelong Earning' and 'Lifelong Employability' (see Longworth & Davies, 1996, 64). By contrast, in the 1970's, when Lifelong learning was first promoted as an international programme by Unesco, it was based on personal growth and on the human being instead of competitiveness and employability.

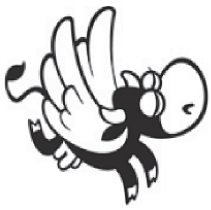
If – as this paper suggests – motivation to read and receive training information, and consequently to participate in adult education is greatly influenced by the images one may have about some of the key words, we should be cautious about how we advertise and market training opportunities. If 'Lifelong learning' and 'adult learning' are banned, we should create new, neutral words and marketing tools to overcome the traditional interpretations and meanings embedded in language.

One good example of this is Opintoluotsi.fi –information service ("Study pilot") which provides access to all training related information in Finland. This service was mentioned as one of the three innovations by OECD: *"....Outreach policies to reach adults who otherwise might not consider learning, or who have little motivation to learn. The availability of pertinent, up-to-date information, sound advice and guidance to the individual needs of adults is the key to success. Adult Learner's Week in the United Kingdom, Learnfestival in Switzerland or the Opintoluotsi open search service in educational information in Finland, are good examples of outreach efforts."* (OECD, 2003).

Instead of using the 'obvious' logo animals such as...

... or...

... we decided to use a neutral, new animal to promote the message of learning, personal development, open opportunities and possibilities:



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PAPER PRESENTATIONS

DESIGNING STUDY SUPPORT ENVIRONMENTS: SOME WAYS TO OVERCOME THE STUDENTS' PASSIVITY

Milka Atanasova

Abstract

Social and economic changes taking place in the current society puts through the mill every age group. People's experience, knowledge and skills are among the key determinants of the success in any context. In the university context students have certain rights, duties and responsibilities, which fulfillment is mediated through attitudes, motivation and learning skills, and also through their future plans. The economic context in Bulgaria breaks the motivation and attitudes for active participation in educational process of the young people. Their passive behavior hinders the processes of meta- knowledge /the development of their meta- cognitive skills/ and influences negatively their personal and professional development. Activation of students in the instructional process requires application of a well deliberate strategy. In that sense the study of the topic "Instructional design" is extremely suitable for at least two reasons: first, to test the pragmatic nature of the theory, and second, to achieve the educational goals laid down. This paper analyses the goals, objectives, stages and results obtained in the work with regular students as well as the mutual benefits to all program participants.

Social and learning dimensions of the context

Many changes are taking place in Bulgaria in the fields of economy, policy, education, etc. The final outcomes are still rather unsatisfactory for many people. The high unemployment rate (14-15%) and the low living standard represent some of the most eloquent evidence in this respect. The social context itself discourages most of the students and makes them indifferent to their obligations as learners.

To motivate and improve the students' active participation is becoming an increasingly difficult challenge to teacher- trainers. Many young people attempt to obtain a diploma by using minimal efforts to acquire knowledge and skills and to improve their personal capacities.

The passive behaviour they prefer to practise (listening to lectures, writing notes and reproducing the learned material during the examinations) does not help them realize their cognitive, social and personal capabilities and weaknesses. Generally, the absence of meta-cognitive knowledge makes the regular students either self- opinionated or extremely unsure of themselves. As a rule, this statement does not refer to those studying and working simultaneously. In the context of their professional obligations they succeed in better realizing their advantages and deficiencies. During the instructional sessions these are mostly the people who are able to clearly define their own positive and negative characteristics as well as their study course expectations. Even working in fields not directly related to adult education, they search for opportunities to gain more benefit from the instruction, both personally and professionally. Unlike the other students who do not work, they ask many more questions and show strong pragmatic orientation. "Working" students constitute a small part of the group (8-10 out of 48), but greatly enrich the learning environment by their ideas, thinking styles, values and attitudes. Very often, and completely reasonably, they correct "infantile" or "abstract" contributions of their non- working colleagues.

Considering those circumstances (in the social and learning context) I defined the following priorities in the syllabus of Andragogics:

- to build up a positive attitude towards acquiring the content of the subject- matter Andragogics (Adult Education);
- to facilitate the creation of a positive ethos and further development of the relations between students;
- to encourage the improvement of students' cognitive, social and meta-cognitive skills;
- to change their learning adjustment – the knowledge is not only a goal, but also an instrument for goal achievement, performer oriented instruction.

Theoretical context

Altogether, 45 lectures and 15 seminars are devoted to teaching in Andragogics. There are key topics in the syllabus concerning the science subject matter, its objectives, achievements, issues, and trends for future development. Some of the topics are hardly understandable for bachelor students in the third semester of second grade. To make students more committed to the theory, and not denying it as a dead load making their studies harder, I developed a "scenario" for understanding and acquiring theory in the form of small projects for "local" action.

One of the topics included in the syllabus is called "Instructional design". In fact, this is the subject matter of the present paper because of its volume. The topic content is based upon previously acquired knowledge, as for instance: models for motivating adult learners, learning theories, learning styles and approaches, learning forms and methods, technology of course development, types of forms and methods for achievement evaluation, etc.

During the lectures students become aware of the concept of "Instructional design" since it is not well known in practice. Actually, the concept "Instructional design" became particularly popular in the theory during the last 3-4 decades.

The Instructional design as a scientific trend develops detailed description of the needed pre-requisites and situations for implementation of effective teaching and learning.

As a theory examines, defines and suggests various models, approaches, strategies needed for achieving certain goals of education.

The Instructional design *as an approach* creates "the scenario" for implementing the activities of teaching and learning. It focuses the attention on the inter-relation between the learning needs (who the learners are and what their needs are), the goals of instruction (why one should study), the development and the contents selection (what to study), the procedures of learning (how to study), and the evaluation of the achieved results (what forms and methods are to be used to identify the learning acquisitions).

In the context of the Instructional design, the results are those which help define new goals, selected approaches, methods and techniques of learning.

Among the most popular models are the following: ADDIE model (McGriff, 2003), Dick and Carey Model (1990), Kemp model (Kemp, Morrison and Ross, 1996) and ASSURE model developed by Robert Heinich, Michael Molenda, and James D. Russell (1993).

What connect the separate models are the three basic activities roughly defined as follows: analysis, strategy development, and evaluation.

The Walter Dick and Lou Carey model is used to activate and motivate the students. This model prescribes a methodology for instruction which is targeted on the knowledge and skills to be taught and supplies the relative conditions for the learning.

The main elements of this model include: determination of instructional goal; definition of the context in which the skills will be learned; writing of performance objectives and criteria for successful performance; development of assessment instruments based on the objectives; development of strategy to achieve the terminal objective; development of "scenario" for instruction; designing and conducting formative evaluation; and, designing and conducting summative evaluation.

This model breaks instruction down into smaller parts and gives a good idea of how to decompose an entity, such as the process of education, into logically related parts.

To know more about other popular models the students become familiar with the ADDIE Model (analysis, design, development, implementation, evaluation).

The "needs"analysis constitutes an important part of the joint work with students or learners. In Dick and Carey's model that part is not particularly isolated.

Methodology of the instruction

So, if the ***first step*** is to *assess* the *learning needs,* how to accomplish it?

Students should take an active part in this phase in order more easily to realize how the learning demands could be examined. To that end they were asked to fill in questionnaires and tests, as well as to answer various questions.

The attention was focused on their own motivation, expectations, learning style, self- analysis skills. The learning motivation was examined by a questionnaire, while the expectations from the course of Andragogy were checked by using written forms. The learning styles were determined using Honey and Mumford's (1992) questionnaire, and the self-reflection about their own learning experience followed SWOT analysis and the K-diagram. It involves describing positive and negative personal characteristics and some ideas on how to improve them.

Data obtained from the first phase served as a basis for implementing the next stages of the instructional design.

By means of the various methods used in the context of instruction the students mastered theoretical knowledge that gradually showed them the stages of the design. In other words, they become real witnesses and participants in the process of how, on the grounds of information gathered about their own learning needs, the next sessions are constructed.

The second step relates to the elaboration of a framework for instructional design (clear definition of the goals and objectives - skills, knowledge and attitudes to be developed) according to data analysis of the first phase.

The third step concerns the development of the 'architecture' of learning activities to meet the objectives.

The next phase represents the implementation, i.e. the step relating to the creation of appropriate study support environments (including learning materials and tasks, pro-active feedback, additional help and support). In other words it means resources and strategies to be utilized.

To facilitate understanding of the nature of Instructional design and to encourage students to "abandon" their passive functions, they were involved in obligatory performance of real tasks prior to the final exam. Every one who is able to successfully perform each of the tasks is given the opportunity to choose the way of taking the exam. Students were informed about that in advance at the very beginning of studying "Andragogics".

There are two possible ways: project development (research area by choice) and defense of the project at the end of the semester, or the second alternative - the traditional and well known written examination during the session.

To successfully fulfil the tasks given they should do the following:

Student's ***first*** step - carrying out a practical task: one of them conducts an interview with adult learners. Each student has to create a framework for the questionnaire and to interview between ***3-5 adults***.

The questions of the interview cover the following areas:

- Why the respondent continues his/her learning or training;
- What kind of difficulties the respondent meets during the study;
- What kind of techniques and strategies he/she applies to learn more easily;
- What the respondent's learning style is;
- What kind of instructional methods the adult learner prefers;
- How the respondent manages the time in order to carry out all personal duties.

The interview aims at stimulating the students to better learn the issues related to the learning style, techniques, strategies, methods, forms of instruction, and provide data for the purposes of Instructional design, at the same time.

The second step involves public activity- presentation of the analysis of data collected via the interviews in front of all students. Students are given the chance to determine the most interesting moments of the interviews that deserve the audience's attention.

They were surprised to find out that many of the respondents were not able to determine their own learning style, did not know what is meant by learning approach, and could not articulate methods and forms they would like instructors to use. On this background they realized how competent they had become by virtue of their theoretical preparation. Moreover, they realized themselves how difficult it is to determine the learning needs of a given learning group if the people participating in the instructional process don't have even a rudimentary knowledge of learning.

To involve students in the phase **"design and development"** they have to continue with the next activities: to participate in working groups. The goal is to develop a draft program for instruction. The program must be designed to meet the learning needs of a given target group. Everybody submits data collected by the conducted interviews. Thus a "target group" of approximately 18-24 persons is constructed.

The program should determine the instructional goal and objective on the grounds of the learning needs and develop an instructional strategy- selection of appropriate methods, type of activities and feedback. Finally, it includes also design and conducting formative evaluation.

Final phase – evaluation is implemented at two levels.

The First is "expert evaluation" held by a team of students (with arguments - positive and negative characteristics of the elaborated programs).

The three ***best programs, developed by the particular groups,*** are announced (by students and me) and everybody can make a copy after receiving the "authors" copyright permission.

The second is to determine by filling a questionnaire how successful the ID is in facilitating and supporting students' activities.

Otherwise said, students make particular activities alone (the "target group" turns into instructional designers).

The successful fulfilment of the tasks (according to previously defined criteria) confronts students with new challenges – selection of the project subject area and deciding upon whether to work in team or independently.

The nature of the project work itself creates conditions for spontaneous interactions with the lecturer and other students, as well.

The project preparation involves students in carrying out various activities, as for example: selection of research field; defense of the choice; precise denomination of the selected topic; creation of the action plan; thinking over the technology of project elaboration; time management, presentation and self- evaluation.

Evaluation of learning benefits:

According to students:

1. More generally:

Working on learning projects (more thorough investigation of a given issue in the adult education field) gives them the opportunity to develop a number of important skills to be of value in the working environment, too, as for example, skills for generalizing large informational resources; defining conclusions independently; decision making; team working;

allocating duties and responsibilities; defending one's own position; evaluation skills; self-reflection skills.

2. More narrowly:

The students learned more about themselves, about their positive and negative characteristics (for that purpose not only practical tasks are used, but also many other techniques, diagrams and tests). They developed skills to manage the learning process and improved their skills to present own work. Moreover, they extended their interactions with people who possess richer worldly wisdom and improve their social skills (to create a contact, to communicate in an effective way). Last but not least, students acquired important techniques for learning; review and assessment of their colleagues' reports.

The technology that I use in the training includes developing of a portfolio by the students. It contains many interesting ideas on how the textbook's content can be structured, how the students can learn more easily, what kind of difficulties they meet.

The personal portfolio represents very good evidence about the efforts made and the progress that each student has achieved and thus illustrates what we both are able to achieve for one semester.

My learning benefits as a lecturer:

1. I developed a model for students' motivation - ARCS

To develop models is a hard task. There's no way to submit evidence for its effectiveness. So, I'd rather try to conceptualize the particular stages of my work with students and to draw the attention to key elements relevant to the very nature of instructional design. In fact, the development of this model has been inspired by the ARCS model of motivation (Keller, 1999). The following parts are separated there: Attention, Relevance, Confidence, and Satisfaction.

In the context of the study curriculum of Andragogics the following elements became prominent:

Attention - directing attention to the course curriculum by using questions, giving examples of good practice in the field of Adult education in a comparative manner, and, presenting photographs and publications.

Reflection was achieved by analyzing and conceptualizing previous learning experience; by reflecting on the experience through various techniques, as for instance, K- diagram and SWOT analysis; by deliberation and awareness of the new paths for development; and, finally, elaboration of one's own plan for acquiring new skills.

Relevance was created through selection of learning content according to the needs, experience and interests of students and by providing a balance between their expectations and the program's requirements.

Satisfaction from the work done involves encouragement and support by the means of feedback, self- evaluation and assessment on the part of the teacher.

2. I developed an exemplary conceptual framework for teacher's portfolio.

One of the most popular ways for improving the performance of the teacher is to create a portfolio.

The portfolio is based on information that helps him/her in the practical work.

To have well structured information and a logical presentation of the teacher's activities, the portfolio should include the following sectors:

1. Design of the educational program
2. Approaches, methods and techniques of teaching
3. Educational resources /support materials, original texts, pictures etc.
4. Evaluating the achievements of the learners.
5. Professional development and improvement of the teacher

3. What are the steps to be undertaken to prepare a portfolio?

First, one has to define what spheres of professional activity will be the focus of the learner's interest. Afterwards one creates one's own matrix or table to present the most relevant information, reflecting the work of the respective teacher. The next stage involves the beginning of the essential work, related to conceptualizing the data obtained from personal observations and analysis – "reflections during and after the actions". Simultaneously, proofs are "collected" (the so called meta portfolio) for the publications, participation in conferences, seminars, papers, plans, suggestions for improvement of education.

4. What could be the stepping stones, structuring the information in the subdivisions of the portfolio?

Design of the educational program - initial situation, differentiation of thematic fields, defining common and specific skills, new ideas for modernizing the educational program. The initial situation for preparing the educational program involves analysis of the previous experience of preliminary information on the expectations of the learners, taking into consideration the requirements of the employers, protocol opinions and suggestions, given by colleagues. The next step is to enrich the thematic fields with information entities, and to define and redefine common specific skills that should be acquired in the process of education.

Approaches, methods and strategies of teaching include description of approaches, methods, techniques and strategies that were effective while teaching learners who encountered challenges in the learning process. Furthermore, there's a need to summarise the experience from teaching approaches and techniques that were used by the teacher in the context of learners successfully managing the requirements of the learning process.

New ideas for applying methods, strategies and techniques, used by other teachers or found in theoretical sources, should complete the process.

Evaluation of the achievements - evaluation criteria, methods and techniques of evaluation, mechanism of successful feedback. The criteria for evaluating the results of the learners and ideas for their precision, regrouping and redefining, should be described in the portfolio. The evaluation methods and forms that were used, i.e. mutual evaluation, self-evaluation, formative summative evaluation etc., should be analysed, and the ways for providing successful feedback with learners should be systemized (the attention could be focused on the various approaches used by the teacher in his/her work, comments and conclusions, ideas for improving the mechanism "feedback").

Teaching resources – working materials, original texts, tests, slides etc.

First, there should be description of the teaching materials that were developed by the teacher and are available at the library. Secondly, provision of a bibliographic list of Internet based resources – constant enrichment of the data base is needed. Thirdly, contents of the teaching packages – lists of all available sources of information needed for the preparation of the learners and for drafting protocols with ideas on their updating and enrichment should be outlined.

Raising the professional qualification – professional improvement

This includes creation and updating of the list of own publications in newspapers, magazines, journals, participation in various forums – conferences, discussions and working groups, presenting a list of completed courses for acquiring or improving computer literacy, foreign language, postgraduate qualification, master program etc., and, developing a plan for future professional and personal development (defining short and long-term goals).

Conclusion

Involving students in the process of fulfilment of various tasks with gradually increasing difficulty reveals their skills to cope with challenges in both academic and informal context. Creating an appropriate study environment for acquiring knowledge and its practical application makes students more confident and encourages them to take over the responsibility for their own personal and professional improvement.

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THE MODEL CONNECTING LEARNING ORIENTATION, MOTIVATION, LEARNING STYLES AND THE ROLE OF LEARNING ENVIRONMENT

Barica Marentič Požarnik

Abstract

The model of learning approaches/styles (Ramsden; Entwistle; later also Vermunt et al.) is potentially important for understanding and improving education in young peple and adults. It explains connections between learning orientation (for example orientation to meaning, reproduction, achievement and vocation), motivation (extrinsic – intrinsic, positive- negative, achievement motivation) and learning approach or style (surface, deep, strategic; holistic – atomistic). To achieve high quality results, it is important to encourage a deep approach/style in learning.

The basic question is to what extent learning style is influenced by personal characteristics and/or by situational or context variables. Most probably we can speak of an interaction, learner's perception of learning environment representing the link between the two. We still do not know enough about the influence that the (not always optimal) learning environment during formal schooling has on learning styles in adults. But the important task of the teacher of adult students remains to design a learning environment that encourages and sustains a deep approach and meaningful orientation to learning.

Introduction

Learning motivation of young people and adults is becoming one of the fundamental problems of today's education. Often we speak about the crisis of motivation. To motivate unmotivated and less able students is regarded by some as the most important task for education in the 21st century (Hidi, Harackiewicz, 2000). In the basic document of our school reform, we have also listed among the most important problems that we have to face and solve the lack of educational motivation (Izhodišča... 1996, pp. 10). But we too often seek shortcuts and look for short-term results, in the sense of external control and other isolated measures in schools, without looking at the systemic inter-connectedness of high quality teaching, learning and motivation. This can have adverse consequences for learning motivation in adults.

Therefore, I shall present a model that brings important variables together in a meaningful way and also gives a sound basis for improving the context of formal and informal adult learning.

Connection between learning orientation, motivation, approach to learning and outcomes

The model of learning approaches/styles (Ramsden; Entwistle, Vermunt et al.) is potentially important for understanding and improving education in young people and adults. It is an attempt to explain connections between student's learning orientation (for example orientation to meaning, reproduction or achievement), prevailing motivation (extrinsic – intrinsic, positive- negative, achievement motivation) and learning approach or style, conceived as »*a general tendency to adopt a particular learning strategy*« (Entwistle, 1996, 93). On the basis of phenomenographically based research, performed in Great Britain, Sweden and Australia in the 70s and 80s (cit. after Entwistle, 1996, 80-83; 101-102), a relatively consistent model emerged which confirmed connections between learning approach, motivation and learning outcomes.

Learning orientation (mainly investigated in university students and also part-time adult students) is linked to the student's intentions and also to study strategies; three main learning orientations have been identified:

- **Orientation to personal meaning** (student is motivated mainly by his or her interests in the subject matter – **intrinsic motivation** – and in personal development; the approach to learning is predominantly deep, holistic, oriented toward comprehension and interconnectedness of subject matter. It is relatively independent, not mainly »syllabus bound«.
- **Reproducing orientation** (student is motivated mainly by fear of failure – **extrinsic and negative motivation** - sometimes combined with anxiety; he or she wishes to get

a degree by minimal effort. The surface approach and serialist learning is prevailing; the student tries to guess what the exam demands are and wants clear instructions and a defined syllabus to guide studying.

- **Achieving orientation** (student wants to »outperform« others, to show excellence, to get the highest possible grades – »university as a competition game«). This means that **achievement motivation** with hope for success is prevailing. The approach to learning is flexible, strategic, organised – may be deep or surface, as the situation requires.
- It is interesting, from the point of view of adult learners, that Vermunt, in his study of part time students, found also what he called a **vocational orientation**, characterised by **motivation to get useful knowledge**, applicable to the vocational field (Vermunt 1993, cit. in Marentič Požarnik et al. 1995, 148-149).

The study orientation is also connected to the individual's **mental model or conception of learning;** if we see learning mainly as a quantitative increase of knowledge, we shall use reproductive strategies; if learning is something that helps us to better understand the world and ourselves and to achieve personal change, our strategies are going to be in the direction of a deep and meaningful learning approach. (after Saljo, see Marentič Požarnik 2000, Peklaj 1995, 158-161)

Table 1: The model of learning orientation, motivation, style and outcome (the synthesis of Entwistle, Ramsden, Vermunt et al.)

Learning Orientation	**Learning Motivation**	**Learning Style**	**Learning Outcome**
Personal meaning	Intrinsic motivation	Deep Holistic	Deep understanding
Reproducing	Extrinsic Fear of failure	Surface Serialist	Incomplete understanding
Achieving	Achievement Motivation	Organised Strategic	High grades
Vocational	Vocational interest	Task oriented	Useful knowledge

The important point is that different approaches to learning (deep, surface, strategic) lead to different outcomes. The connection is logical as well as proven by empirical results (Ramsden, 1988). The student who just tends to memorise facts and is focusing on »signs«

of the study text instead of ideas and meaning would end up with poor understanding and a knowledge of disconnected facts which leads to quick forgetting. A student with a deep approach that interacts in different ways with a study text and relates concepts to previous knowledge and to personal experience, has a better chance to remember and later also to use the knowledge in different contexts and practical situations.

The learner's perception of the learning environment

Here, we shall not go into other details about differences between deep, surface, strategic and also deep active, deep passive, surface active and surface passive approaches as well as the serialist and holist approach (Marentič Požarnik et al., 144-145). We shall concentrate on the connections between main aspects of the model – study orientation, study approach, motivation and outcomes, from the point of view of the study context.

The basic question is to what extent the individual learning approach/style is influenced by personal characteristics on the one hand and by situational or context variables on the other. Most probably we can speak of an interaction, **learner's perception of learning environment** representing the link between the two. It is the way student perceives and interprets the educational context which is important. Among the most powerful components of this context are **assessment requirements**. *»Students' perceptions of assessment and teaching profoundly affect their approaches to learning and the quality of what they learn.«* (Ramsden, 1988, 24). Unfortunately, pleasing teachers and learning to get high grades does not necessarily lead to learning for understanding. The challenging task is to design teaching in such a way that »pleasing the teacher« would overlap with learning for understanding and a deep approach to learning. One of the obstacles is teachers' inability to »assess for understanding«, another poweful obstacle being too much stress on results of external testing (»high stake« testing).

The external testing, which by its very nature has to be objective and thus less sensitive to higher cognitive goals, can be very detrimental in this respect. In Slovenia, a number of research studies have shown that the effects of external final tests in the general secondary school ("matura") go in the direction of lowering the cognitive level of the teaching process, consolidating the transmission mode of teaching and reducing the variety of the teaching methods used, like independent group projects, open classroom dialogue. The attention and effort of students, especially in the last two years of secondary school, is directed more or less exclusively to results on external tests and thus leading to surface approaches, unstable knowledge and quick forgetting of basic concepts and principles (see Rutar Ilc, 2001; Marentič Požarnik, 2001; Šteh Kure, 2000 and others).

A too competitive, achievement oriented climate certainly has detrimental effects on intrinsic motivation. A comparative study has shown that British, compared to Slovene adolescents, are more interested in what they learn at school, they like to go to school, see more usefulness in what they learn, are less bored, see themselves as being more responsible for the school success, perceive that teachers have fun in teaching; British students also try harder to do their best, are putting effort also to learning things that are not so interesting and are more critical in their learning. They also have a better self-concept in 5 out of 6 areas (Slovene adolescents having a comparable self-concept only in sports) (Kobal, 2001). We should not forget that the student's self-concept is closely linked to the attitude to learning and schooling; persons with a positive self-image are also more resistant to failure and have a chance to be self-directed learners (Peklaj, 2001).

The long-term effects of teaching and assessment practices should be regarded as more important than short-term interests of testing for student selection even when justifying it with »we need external pressures, not everybody can learn with interest.« (Šebart, Krek, 2001).

The support of intrinsic motivation in adults has to be systemic

It is important to support the development of what Csikszentmihaly refers to as the »autotelic personality«, which can give full energy to activities which are meaningful and personally important, regardless of external praise, rewards or personal ambition, fame, or money. Full concentration on such activities brings the optimal state of »flow« – *»when emotions, volition and cognition speak the same language.«* (Csikszentmihaly, 2001, 163-165). In today's world, people get less and less chance for enjoyment in giving their full energy to meaningful activities in learning and work, and displace their »life centre« to free time activities, many of those being passive or unproductive (TV consuming) and even harmful, as drugs and violence..

In one of the studies, »autotelic« adolescents chose more active free time activities, those that required more organised effort; besides, they also spent more time learning (6 hours per week more than other, less »autotelic« youngsters; they reported on the whole a better quality of life, more fun and more self respect (Csikszentmihaly, 2001, 95).

In a similar vein, the CET – **Cognitive Evaluation Theory –** proposes that underlying the intrinsic motivation are innate psychological needs for competence and self-determination. The effects of external rewards or pressures, assessment, deadlines, competition... depend on how a person perceives them - more as an external control or more as information about one's competence. In other words: events that decrease perceived self-deter-

mination, will undermine intrinsic motivation; those that increase perceived self-determination (connected to an internal perceived «locus of causality«), will enhance intrinsic motivation. (Deci, Koestner, Ryan, 2001, 3) The concept of an internal as compared to an external »locus of causality« can be regarded as analogous to the concept of »autotelic« personality. And the »orientation to meaning«, mentioned at the beginning, that leads to deep learning approach, also implies autonomy in learning, a relative independence of immediate course requirements.

Learning for tests and examinations, as well as the prevailing transmission mode of teaching, overburdened curricula and time pressure, lack of active methods, too little dialogue and student initiative - these characteristics of formal schooling, characteristic also for a large part of higher education, have long-term influence on learning motivation, attitudes to knowledge, learning styles as well as on self-confidence in adults. We need more research in this area, especially about how perceptions of adult part-time students are affected by their past as well as immediate study experiences. Also, one of the most important tasks for the reform of higher education remains to design a learning environment that encourages and sustains a deep approach, meaningful orientation to learning and intrinsic motivation.

The teaching as well as assessment of adult students should be maximally aligned to the objectives we want to reach and to the characteristics of the students (Biggs, 1999). This means among other considerations clear, meaningful goals that match the abilities, interests and especially the vast experiences of adults, taken in the broadest sense (Jarvis 2003), it means creating a good group climate, introducing methods that give place to initiative, ideas and self control of students, varied forms of »alternative«, authentic assessment, including self-assessment and peer assessment (Biggs, 1999, 204-206). These are some basic ingredients that would support intrinsic motivation, »autotelic« personal traits, self-confidence and an orientation to personal meaning that lead to deep learning. In some cases, adverse experiences from previous schooling would need some time to be overcome, so more teacher support would be needed at the start. But according to the best founded current theories on learning and motivation, this combination promises to give good long-term results (learning with understanding, a wish to learn more in the future) and personal satisfaction.

The achievement of such changes in a predominantly traditional university setting would require sustained support of university staff, in terms of in-service training, consultations, action learning and action research, aimed at changing their conceptions and practices; the results are not quick but they are important (Marentič Požarnik, Puklek Levpušček).

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DISTANCE ACADEMIC ADVISING AND SUCCESSFUL SUPPORT OF ADULT LEARNING

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Abstract

"A primary goal of distance education is to provide an environment in which learning occurs at the time, location, and pace of the individual learner." (NACADA, 1999) Flexible distance education, in any delivery format, can be a wonderful, self-directed educational option for adults. It can also be an isolating and disappointing experience. Quality academic advising is one of the most important continuous threads in the successful learning journeys of adults, and this is particularly critical in distance education programs for adults.

Technology and curriculum design are two of the most prominent distance education topics in the field of distance education practice and research. These are engaging and important topics, but their predominance often overshadow other important and overarching themes. I propose to highlight in this paper quality standards and best practice for distance education academic advising as set by various international educational organizations in relation to promoting adult motivation and learning. I will address how these distance education standards relate to the relationships between adult learners and advisors and advising tools, including how advising is an important part of the teaching and learning aspect of education.

In summary, advising of students should be seen as critical motivating and learning components of the adult educational experience in addition to the supporting role with which academic advising is normally identified.

The purpose of this paper is not to describe the era of the institution or the era of the professor within post-secondary education, but to describe, at least from my North American viewpoint, what Barr (1995) identifies as the era of the student. The central theme throughout my discussion is that the role of an academic advisor-adult educator must be, at least in distance education if not in all adult learning systems, student-centered in order to fully enable the adult learner in the educational setting. For our discussion, an academic advisor working within a distance education environment is someone who provides general information and support services as well as assists students in the development and implementation of meaningful educational plans that are compatible with their life goals. In Europe, I believe this type of advising service is generally delivered through what is called a counseling department. In Canada, the formal term of Counselor is typically reserved for a more specialized group of counselors who resolve personal life issues that are interfering with a student's academic aspirations. A few quotations in this paper refer to informal counseling and should be interpreted to mean the same as my references to academic advising. I will not address the underlying philosophies or theories of North American academic advising, but I will be pleased to provide further references to any adult education colleagues who are interested in learning more about this area of study.[1]

To begin with, I would like to provide a brief overview of my Canadian perspective on distance and adult education. The topic of academic advising within a distance education model has become a research interest to me as an educational administrator. The role of an academic advisor, at least from my Canadian perspective, is a role that attempts to balance best practices and standards with, what appear to be inherent problems in the system. Advisors work very closely with students, and are important to the student learning process, but adult learning systems in distance education do not always fully utilize advising resources. Throughout our discussion I will share with you some results of my recent surveys and research into these inherent problems, and will present some practices I believe can be used as a starting point to improving the overall learning of adults in distance education.

The topic of adult learning within Canadian distance education models has enjoyed much discourse over the years. This discourse centers on whether distance learning aids social education, a true form of adult education or whether the learning only supports the narrow focus of what Spencer describes as education for adults, where the learning has a

1 The National Academic Advising Association (NACADA) is the most comprehensive organization devoted to academic advising in North America, and has some very good resources. It is based in the United States and is predominantly concerned with younger adults and formal education, but it also has facilitated research and created resources for adult education and distance education. For more information, see the NACADA web site: http://www.nacada.ksu.edu/.

specific vocational-self interest purposes (1998, pp. 343-346). Although the debate is interesting from a theoretical perspective, as academic advisors must support adult learners regardless of intent in a positive way. Consequently, for the remainder of this paper I will focus on those practices I believe best support the adult learner to achieve her or his own aspirations.

For most of the twentieth century in Canada adult education followed an informal path where numerous non-formal types of learning organizations were implemented. In the 1970's several institutions were created to provide greater educational access opportunities for a wider range of adults. These institutions were designed using the Open University, United Kingdom style of open distance education. As Selman notes, the Open University, UK "took the long-established practice of 'correspondence study' and embellished it in a variety of ways: supplementary broadcasts, local tutoring and counselling centres, audio and other augmentation of the traditional print materials in the course packages, and brief residential periods of study" (1990, p. 274).

The Open Learning Agency (OLA), the institution, of which I am employed, was one of the Canadian institutions created on the UK open distance learning model. The OLA provides informal, non-formal and formal types of learning to the British Columbia public.[2] Examples of these kinds of programs include: television broadcasts; community learning centres; and courses and programs in the areas of adult basic education, vocational and trades training, as well as college and university credentials (OLA, 2003). The programs and courses can be taken for both credit and non-credit interest only purposes.

Since the 1970s, many traditional post-secondary institutions in Canada have followed the government's lead in what can be loosely categorized as progressive educational philosophy, a philosophy that recognizes the importance of providing opportunities for individuals to engage in personal development and social progress (Darkenwald, 1982, p. 69). Although opportunities for adults to engage in non-formal and informal education through public distance education in Canada still exist, a new distance education hybrid model that is a combination of informal and formal education now exists. For our discussion, informal education means part-time and self-directed and is sometimes called continuing education; and formal education means a type of education that is full-time and for credit (Shale, 2002, pp. 1-7). This Canadian hybrid type of approach to adult distance learning encompasses part-time, self-directed, non-credit studies as well as for-credit and full-time studies. In Canada, distance education is delivered by both public open learning institutions and traditional schools such as secondary and post-secondary systems, technical institutions,

2 See http://www.ola.ca

and universities, along with some private institutions (Spencer, 1998, p. 26). Traditional on-site educational institutions that now deliver some distance courses and programs are referred to as dual-delivery or dual-mode institutions.

The expansion of distance education offerings via traditionally on-site institutions is reflective of the trend known as lifelong learning.[3] Fretwell and Colombano noted a definition of lifelong learning within a discussion paper for the World Bank:

"lifelong learning, taken in the broadest sense, is to help individuals obtain the skills and knowledge to assist them in adapting to different stages of their life including: (a) early separation from family as a youth, (b) life as a wage earner and member of society during adulthood, and (c) life as an older adult during which time individuals withdraw from the workforce and enter retirement." (2000, p.5)

In traditional adult learning the last two stages are of most important, but in distance education students come from all three phases. For academic advisors this often causes much confusion for those trying to apply the research to best practices. An example of this confusion is found when one considers that most research on academic advising at a distance comes from studies based at traditional universities and colleges in the United States. This research focuses primarily on phase one of the definition of lifelong learning because these institutions have a dual-delivery model as opposed to the Open University UK that focuses more on phases 2 and 3. Adult education planners must also be aware that adult-intended courses may attract young adults, who have different needs. A plan should be in place to enable success of both sets of learners.

Most distance programs and courses at the Open Learning Agency are specifically designed so adults can take advantage of flexible entrance criteria.[4] This flexible entry criterion is very different from most traditional universities that have rigorous admission procedures, and little acknowledgement of past learning. North American traditional universities are becoming more interested in distance education and professional continuing education and general continuing education programs. Consequently, the lines between distance and open learning and traditional learning are becoming more and more blurred. Examples of the existence of both "open" and "distance" learning can be found in the courses and programs of most dedicated distance providers (Harry, 1999, pp. 1-12). Open entry is firmly rooted in adult education theory, but best practices of distance learning success indicate that open admission needs to be linked with appropriate course or program admission

3 A critical and provocative view of the current use of the term and concept of "lifelong learning" is one by Michael Collins: "The concept of 'lifelong education' has been neatly hijacked for state-initiated educational policy formation, school curriculum development and an ideological distortion of lifelong learning to mean schooling from cradle to grave (1998, p. 107).

4 For an example of distance open admission, see http://www.bcou.ca/services/home.html on the British Columbia Open University (BCOU) Web site (a division of the Open Learning Agency).

mechanisms to ensure the learner is fully aware of and ready for the distance learning experience.

Although there is some integrated theory linking adult education, distance education and academic advising, there are many areas within this combination of fields of study that require greater attention and debate if we want to see residual practices that more fully support students studying at a distance. Without the foundation of a wide body of integrated theory, the practice of adult distance academic advising will not reach its potential student learning contribution. As noted earlier in this paper, adult education theorists are reluctant to fully embrace distance education because of the independent study nature of many distance courses and programs. At the same time, distance education theorists focus on technology and instructional design in their theory[5]. According to an analysis of Canadian national policy on distance education by Roberts, Canadian distance education emphasis on technology and instructional design in research and development may be due to national government-led initiatives in these areas (1996, pp. 57-65). Although academic advising theorists have made some recent progress in addressing adult distance education academic advising theory, academic advising theory still concentrates on traditional on-site formal education programs for young adults (Gordon, 2000, pp.xi-xvi). Suffice it to note that work needs to be done in this area because adults are ever increasingly accessing distance education and in order for that group of unique learners to succeed, creative educational systems need to be in place. The best systems for the learner require collaborative work by teams of educators (including academic advisors). Academic advisors should be considered by other adult educators as co-educators in the process of learning, and as important enablers of adult motivation, learning and achievement in formal and informal distance education.

When teams of educational planners consider implementing distance learning, there are many items to consider. Although best practices, standards and quality assurance evaluations of education are commonly used for institutional accreditation and evaluation purposes, Murgatroyd has urged governing bodies to "move away from their approach to quality in terms of standards and towards a process orientation assessment of the design of learning organizations" (1995, p. 14). This would, according to Murgatroyd, allow for a more equitable assessment of innovative programs, and also focus attention on under-

5 There are numerous examples of Distance Education research and theory focussed on technology and instructional design. Interested individuals need only browse through some Distance Education journals to see related articles. E.g. Related Journals: Distance Education, American Journal of Distance Education, Epistolodidaktika, European Journal of Open and Distance Learning, Journal of Distance Education, Open Learning, etc.

standing effective learning organizations. An example of quality design assessment is Geneva's International Standards Organization (ISO) program. Process orientation is valuable and important for assessment, but it is still useful to look at some standards and best practices, particularly for the purposes of improving support services for students learning at a distance.

In Canada and the United States, unlike many other developed countries, the national governments have limited educational mandates, having devolved the realm of most educational responsibilities to the realm of the provincial or state domains.

Therefore, research about standards and best practices in North America must focus on professional associations, provincial or state criteria and individual institutional information. North American standards have followed the example of world organizing bodies, such as UNESCO. I will mention some related UNESCO standards, but before that I would like to highlight some other possible planning tools that can be used to ensure that adult learning needs are addressed in distance education.

The European Distance Education Network has outlined in *the Basics of Distance Education* a conceptual document that highlights most traditional educational systems "predefined learning regimes which impose severe restrictions on students in what concerns learning places and paces, curricula, teaching and study methodologies" (Trindade, 1993, p. 37). In contrast, distance education systems should be much more innovative and different according to how they interpret the following essential variables:

- Who Learns
- Who Teaches
- What to Learn
- When to Learn
- Where to Learn
- How to Learn

These basic elements *"give the students a higher or lower degree of autonomy or a higher or lower interaction with the teaching system. The interpretation that the educational structure makes about these different elements, in order to adapt them to the students' needs and specific objectives, determines the existence of a diversity of learning regimes."* (Trindade, 1993, pp. 37-38).

As mentioned, a diversity of learning regimes also creates challenges in learning at a distance. Students need guidance to sort through the choices to find the ones that suit them, or to also find out that none suit them just now. With educational funding mandates as restrictive as they now are, offering a number of flexible choices to learners is sound

theoretical as well financial practice; the more choices learners have, the higher the chances are that they will choose one, and will succeed at their goal.

Adults are engaged in distance education largely because their commitments to family and work, and sometimes their geographic location, are such that they cannot access traditional on-site courses and programs. Adults are also increasingly engaging in distance education because of the convenience, and the personal or professional relevance the courses and programs offer them. As theorists and practitioners have stated, within adult education there need to be critical learning factors for motivation to begin distance education studies, and equally compelling factors must help sustain the studies if they are to be concluded with success. As Dortch has recently highlighted, "awareness of possible motivations behind students' enrollments allows better insight into how to remove barriers and obstacles to distance learning" (2003, para. 4).

When planning distance education courses and programs, education planners should consider the basic ideas of adult education theory and acknowledge that there are multitudes of reasons to engage in learning. In general, not all adult learners are interested in a formal 'education'; the learning itself may be their end goal (Selman, 1991, pp. 160-161). Support services and institutional policies should also reflect whether or not the institution is able to support these multiple learning reasons. Learning opportunities such as non-credit, instructor-supported courses are easily implemented options within traditional education programs to accommodate those interested in the learning aspect only choice.[6]

Adult learning is an individual experience, activated in various ways, and is dependent upon meaning and connection (Hill, 2001, p. 79). The challenge within this reality comes in trying to create distance educational systems that address individual needs. In addition to the individual learning differences, there are challenges of applying sound practices to a variety of different types of education studies – from traditional correspondence-type courses, to highly technical and interactive online courses. The European Distance Education Network's Basics of Distance Education format mentioned earlier is one such simple, yet effective tool that may help address individual learning needs of adults.

The issues in adult distance education are multi-faceted; therefore, planners' solutions should be multi-faceted. We must focus on micro as well as macro levels of planning and delivery if we want to assist both educators and learners to be successful. If learners are individuals and should be treated as such, and if the courses, programs and entry into distance education have varying degrees of flexibility (even within one institution), then it seems logical to postulate that if adults are to fully succeed in their learning, they need

6 Example from BCOU: M-grade (non-credit) options for courses definition: **M** grade - Credit-free option. Assignments completed. Examination not required. (http://www.bcou.ca)

more than just excellent, customized in-course instruction to succeed. They require a variety of mentoring and learning assistance to support them in their learning. As Hansman has noted in her work on understanding situated cognition, "helping students understand and become participants in academic culture" (2001, p. 47) is one of the facets of learning that we as professionals may need to support the adult learner in understanding.

The Council for the Advancement of Standards in Higher Education (CAS) is an organization in the United States that sets out professional standards for higher education. The Association of Universities and Colleges of Canada is an affiliated member of CAS, so the standards are also recognized in Canada, but they are most widely used in the United States where post-secondary assessment ratings are deeply entrenched in the culture of institutions. As noted earlier in this paper, the U.S. post-secondary system is mainly focussed on the younger adult learner who is engaged in formal learning, and the CAS standards do not directly address adult learners.

There is reference in the CAS standards to distance education. CAS standards state that services should be "based on theories and knowledge of teaching, learning, and human development, ... reflective of population served, and ...responsive to the special needs of the individual" (2001, p. 119). CAS standards also emphasize equal opportunity, access and affirmative action for staff and students. In regards to academic services, the guide states that the "needs of distance students should be carefully analyzed. Programs and services to aid these students should be carefully designed to meet their particular needs" (2001, p. 120). The standards also indicate that academic advising for distance students "should be designed around their particular needs" and that there should be "additional services to assist students in goal setting and educational and life planning ... provided as needed" (2001, p. 122). Within the CAS standards for distance education there appears to be a solid foundation for adult learning, but for the purposes of this discussion it does not fully address the topic of providing academic advising to adult learners at a distance.

The Commonwealth of Learning's policy on open and distance learning focusses on dual-mode institutions, and includes suggestions that administrators should consider a variety of policies, regarding admitting non-traditional students. Their example for considering different policy approaches for non-traditional distance learners is about course prerequisites and whether it is appropriate or not for "a certain amount of on-the-job experience to replace academic course credit" (Bottomley, 2003). It is interesting to note that COL's reference to teaching and learning processes specifically identifies the inclusion of "counselling and other forms of student academic support" (Bottomly, 2003). Similar to the CAS standards, Bottomley notes in the COL document that "policy makers should analyse the student on-campus experience to identify ... which facilities or ... activities on-campus stu-

dents value most as part of their overall learning experience." The results of this analysis can then be used to help develop distance learner services (Bottomly, 2003). This is a good idea for dual-mode institutions. It is important to remember, however, that distance education students' needs are not likely going to be the same as onsite student needs, so an analysis of this kind would have to be repurposed to become a useful planning tool. There is some embedded adult education practice in these Commonwealth of Learning recommendations, but not a lot of useful information regarding adults and supporting their learning by distance.

The Open University, United Kingdom has played a major role in defining distance education quality assurance practices in Europe. The purpose of the UK quality assurance guidelines is "to provide definitions, identify challenges and look at how physical separation of the teacher and the learner impacts upon the way in which teaching and learning is managed" (Mills, 2003, p. 4). The documents also cover the dimensions of distance learning. Unfortunately, I have not been able to fully view these documents, but from the references I have seen, the OU, UK's work in this area has significantly influenced other European distance education programs.[7]

The Canadian Recommended E-learning Guidelines document, created in part by the Canadian Association for Community Education, is specifically oriented to programs that are designed to make students job-ready (Barker, 2002). The Canadian Recommended E-learning Guidelines is a clinical effort highlighting processes and practices in distance education, including endorsing assessment and recognition of prior learning. The guidelines come short in suggesting ways to allow adult learner to self-direct and, or, adjust their academic goals midstream. Although quite detailed, the guide takes an assembly-line approach to the commercialized end of education (Barker, 2002). This is, perhaps, not surprising considering that the theories and practices in distance education tend to focus on the mechanics of learning as opposed to concentrating on the essential human aspect of learning.

The Association of European Correspondence Schools (AECS) has published "Minimum Standards of Quality for AECS Members" (1998, pp. 121-125). It is a very brief document that seems to closely follow typical traditional on-site sets of standards, with a few minor modifications to accommodate the separation of student and institution. The counseling practices section mentions that someone should be available to take student calls during regular business hours and should answer communications within 7 working days of receipt (1998, p. 123). The mention of email and web resources is distinctly absent. Recent searches on the Internet for AECS directed me to several sites that seem to indicate that AECS has

7 I hope to be able to obtain more information on OU UK standards before the October presentation.

had a complete reorganization in the past few years, and is now associated with world leaders in distance education and technology through the organization known as EDUCAUSE[8]. Unfortunately, as with Canadian E-learning Guidelines, and other similar standards, the AECS is now focussing on technology and course design. An Internet document about AECS written by Bernd Schachtsiek, President of the AECS, does make an effort to bring the learner into the process, but it is still obvious that AECS is most interested in the technologies of education (2003).

Garrison has noted that, "the challenge for distance education theorists … is to provide an understanding of the opportunities and limitations of facilitating teaching and learning at a distance with a variety of methods and technologies" (2000, p.9). It seems that many distance education practitioners have enthusiastically embraced the technologies part of their interpretation of the theory, but have not embraced the opportunities to acknowledge some of the limitations of learning at a distance, and provided alternative methods and technologies to the problems. As a World Bank report on Teacher Education at a Distance has stated, "Distance Education, like more conventional methodologies, has strengths and weaknesses and the more successful programmes are those that have used its methods in conjunction with other methods" (Perraton, 1997, p. 9). The report also concludes that, "within a distance-education programme the choice of technology needs to match its purposes" (Perraton, 1997, p. 10). If adult learning is going to be fully empowered, distance providers must be willing to look closely at the learners to determine the delivery and interaction needs, and not get carried away with the alluring qualities of the latest and greatest technological advances. The newest bit of technology may indeed be appropriate for the purpose, but it might not be appropriate either.

This opens up the discussion to look at what are appropriate advising activities in the realm of distance education. Simpson emphasizes that distance education students require regular, periodic guidance as well as counseling on academic and non-academic matters. This includes activities such as informing, commending and exploring (2002, pp. 37-48) – much more than simply explaining course prerequisites and course sequencing. As Fraser noted in her research about distance nursing programs, "counseling and advising are the sum and substance of closing the distance between … students and the universities" (1999, pp. 46-47). She also noted in her research results that program administrators "maintained that effective counseling and advising were crucial for student success" (1999, p. 47).

Cookson's 1990 article about persistence in distance education is still relevant today, and includes details that should be considered in combination with the newest technology and

8 http://www.educause.edu/

service standards that are out there. Cookson notes that it is very important to have "skilled diagnostic counseling to 'help each applicant to explore his aims, motivation and commitment and comprehend how they might relate to the ... [institution]'" (1990, p. 3). He also noted in the planning of distance education programs, that resources for student advising and other learning assistance should concentrate on the most vulnerable students, those entering the program (1990, p. 3). Best practices at the Open University, UK also highlights the importance of managing open entry carefully (Tresman, 2002, p. 6). A different study of adult distance learners concluded that the merits of introducing study strategies for distance learners were not conclusive. The researchers did, however, receive very favourable responses from students regarding "efforts to develop generic skills and enhance deep learning ... particularly in the early stages of their study pathways" (Morgan, 1998, p. 52).

As further Australian research has shown in the studies on adult university distance students, "robust pre-enrolment guidance" and possibly some preparatory courses in distance education are critical for adults to identify and come to terms with their underlying motivations to learn (Bird, 2003, pp.8-13). These motivations are the key to success, particularly in the long-term goals of university education, but the theory applies to all short-term and longer-term study goals. Reasons for returning to study and common challenges in distance education are among the items that need to be fully discussed with adult learners at the beginning of their distance learning journey, and should happen again throughout the journey, as motivation lags or goals change. Keeping in regular contact with distance adult students is an important best practice. Although it is important to fully prepare students for distance education when they first begin, as we have discussed, it is also critical to keep a dialogue open with them over the course of their studies, in addition to instructional support. The academic advisor is most appropriate for this task, and has the best broad-based knowledge for this support work. Courses and instructors come and go, but in a long-term, often part-time program of study, it is the advisor who can help students come to terms with the changing dynamics of their motivation and commitment to their goals, or to help them readjust their goals as needed.

As standards and best practices demonstrate, there is a need for structure in any educational program, and there are slightly different components that work well for distance education. When we look at how programs are designed, and how adult learning can be enhanced in these systems, it seems that it is the meaning and connection of an adult to her or his learning goals and studies that are most important. Much of that meaning and connection is not addressed in the actual courses of study. It happens before and after and in-between courses. The UNESCO descriptions of academic advising (what they call educa-

tional counselling) includes reference to technical academic tasks (such as course scheduling, etc.), but also emphasizes that advisors should "assist students in overcoming educational and personal problems" and "identify systemic and personal conditions that may impede student academic achievement and develop appropriate interventions" (UNESCO, 2002, pp. 25-26). Advisors should provide personal contact as needed to promote retention and help them connect to the institution.

That leads me to the final standards document I would like to mention to you, and the one I find most useful. It is the National Academic Advising Association (NACADA) Standards for Advising Distance Learners. As I have already described, U.S.-based resources are usually focussed on younger adult learners in a formal educational setting, and with U.S. distance education resources, information is usually focussed on dual-mode institutions. Still, the essence of addressing adult student needs in distance education, and emphasizing the advisor's role in facilitating and supporting learning is present in the NACADA information. According to NACADA, one of the most important goals of the distance education institution should be to have an "*institutional philosophy of a distance learning support services program [that] strive[s] to respond to the learner needs rather than the learner adjusting to an institution's established organizational structure with the principal goal being to provide 'individualized guidance' so learners may become more effective in dealing with concerns that influence their pursuit of personal learning goals at a distance and at the time and delivery mode preferred by the learner."* (NACADA, 1999)

One of the most critical points that the NACADA document makes regarding best practices for distance learning is that the program should connect the student to the institution through the advisor, with the advisor being the one main point of contact for the distance learning network at her or his institution. There should be one point of contact (at least in general terms) for most student support needs. The advisor can be that connection, making referrals to other colleagues when appropriate (when the inquiry goes beyond a predetermined set limit of discussion depth). This best practice is driven by what students want – they don't want to have to contact many different people; that is intimidating, inefficient, and can be frustrating as well. The adult learner's motivation for learning can definitely be negatively affected by administrative obstacles to the learning. To facilitate learning, advisors need to "advise on the level that the student needs and wants. Multiple systems and, or, policies may be required" (NACADA, 1999). Most best practice distance education services have a general level of advising, which deals with most incoming inquiries, with specialist support areas (such as financial awards, specialist program advising, personal counselling, disability services, student records, etc.) to assist advisors and the learners if the inquiry is quite specialized.

One of the criticisms traditional on-site academic advisors have often told me regarding the centralized idea of advising and services in distance education is that it is too customer-service oriented, and outside the boundaries of academics. I do not have the space to explore this further, but I would like to state that I believe there are many good customer service best practices that do have a place in educational settings, including general politeness, efficiency of service, etc. In education, the customer is not "always right" as is sometimes the underlying philosophy of corporate customer service, but the student does deserve to be treated with respect, and provided with as much information, and in as timely a fashion as is possible. If educational institutions can provide quality service support to students, the students will have a much better chance to succeed in their learning at a distance.

Conclusions

In the new era of the student in higher education, academic advising has become a critical component in encouraging success for the adult learner participating in distance education. In distance education, academic advising is a key success factor because the advisor has the potential to work with the learner throughout the entire spectrum of the learning experience, not just within the courses themselves. They provide instruction on education, how to work through the systems and how to manage one's studies within complex life styles. They also challenge the adult leaner to think about larger plans and smaller details that will affect their learning. They help students put their learning in perspective to their lifeworld, that place where we learn what life is about. They refer students to other resources (academic, support, and administration) as necessary. The distance advisor should be the student hub for information and support. Also seen as a 'neutral' party, advisors assist learners with the basics of their learning when the learner is unable to contact, is intimidated by or is uncomfortable with her or his course instructor. Advisors have a broad vision of the institution, particularly in distance education, and should be recognized as important consultants for institutional planning. They are also useful teachers for other staff members regarding the institution, and the resources of education in general. As we have discussed, in dual-mode institutions, particular attention needs to be paid to distance education support services. Learner support services do not need to be exactly the same as on-site services, but the quality of support services should be the same for distance students as for on-site students.

As I have indicated, I believe distance education research fails to address the adult learner holistically. Adult education theory fails to integrate the option of distance education learning

into theory, unless it is addressing completely interactive online course work, neglecting the fact that adult learners may need different options than the high-tech one. Academic advising studies also need to expand more fully to explore the adult distance learning experience. As educators, we must be innovative, offer options and understand the learner. Theories, standards, best practices and quality assurance documents can be very useful in establishing distance education best practices, but should be used with critical analysis, with the emphasis on who the learners are, and how their needs can be addressed. As the Slovene plan for adult education has noted, it is extremely difficult to apply appropriate adaptations based on adult characteristics to formal educational programs. An excellent recommendation in the plan is the idea that "special attention should therefore be paid to the level of execution of the programme, above all the education and training of adult educators and to introducing organisational forms and methods of work that suit adults" (SIAE, 2003). This same approach should be used in distance education program development for adults. Be creative, keeping in mind the adult student variables. I believe setting standards for academic advising with a specific purpose to enhance the motivation of learning is a critical one for adult distance education programs, and should be acknowledged at the very beginning of program planning.

Future Steps

This overarching project has assisted me in determining possible areas of further study. I have initiated a quantitative analysis of DE academic advising within the North American context (findings not included in this paper), and I am looking forward to examining the results.

Other possible research topics:

- How closely individual delivering institutions follow and are assessed by national or professional quality standards.
- Communications in advising in Distance Education: telephone, email, web tools, etc., are adding new and important dimensions to the student and the advising experience, but there is very little available information about this subject.

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IS 'SELF-DIRECTED LEARNING' A POWERFUL CONCEPT FOR ENHANCING PROFESSIONAL LEARNING?

Monika Rehrl, Marion Bagusat and Hans Gruber

Abstract

This paper discusses the theoretical concept of self-directed learning in the specific context of professional education. We therefore introduce the Allianz Learning Framework "ALF", an intranet based learning platform of Allianz and Dresdner Bank Germany. Based on the idea of self-directed learning, it is part of basic vocational training in these companies and primarily used by apprentices and their trainers. Referring to ALF, opportunities and challenges concerning professional education and training based on the approach of self-directed learning will be pointed out. First, the theoretical foundations as well as practical pros and cons of self-directed learning are discussed. It is argued that uncertainties in the use of the concept result from theoretical shortcomings. It is important to distinguish between extra-personal features of self-directed learning processes and intra-personal requirements for self-directed learning. From this differentiation, a number of factors and settings is identified which support successful self-determination in learning. The learning and communication platform ALF is used as an example to illustrate benefits and boundaries of self-directed learning in vocational training. ALF is an important part of Allianz apprenticeship programs. First evidence from the implementation of the system includes positive effects as well as new challenges. The results are used to design further studies using ALF to investigate intra-personal effects initiated by self-directed learning with the support of modern technology. In particular, further analyses will have to study how these effects influence the organisational learning culture. It is assumed that the combination of individual and organisational benefits builds up most of the promises self-directed learning provides for professional learning.

Introduction

Self-directed learning is currently one of the best-known learning concepts because it is able to meet the requirements from diverse sources: the humanistic self-determination concept, the constructivist learning and teaching approaches and the economic need for efficient learning and working processes. Different demands produce different definitions, emphases and interpretations of self-directed learning. Accordingly, various approaches exist to realise and implement self-directed learning – especially in the context of professional learning –, mostly with less impact than anticipated.

This paper aims to explain the universality of self-directed learning as a basic learning concept by discussing its educational and economical effects and, in consequence, presenting a theoretical foundation of the requirements for self-directed learning.

The Allianz Learning Framework "ALF", an intranet based learning platform of Allianz and Dresdner Bank Germany, is described as an example for the realisation of a technology based learning and communication system supporting self-directed learning in a vocational training context. Referring to an evaluation of ALF, opportunities and challenges concerning professional training based on self-directed learning are outlined.

Self-directed learning – pros and cons

In the last decades "self-directed learning" has developed into a so-called "megatrend" in educational fields of research (Achtenhagen, 2001). The concept is - even though not consistently – treated in plentiful theoretical articles (Schwetz, 1997) which are relevant for educators in almost every field of practice. That does, indeed, indicate a megatrend: Self-directed learning applies to anyone, of any age and in any field of education. Moreover self-directed learning unifies a variety of learning theories, e.g. theories on motivation, on learning strategies or on metacognitive processes.

Reasons for self-directed learning coming in vogue so powerfully can be deduced from two main argumentations: From economical considerations in the industrial area reacting to demands in rapidly changing working environments and from philosophical points of view favouring humanistic and constructivist ideals of self-determination.

Both aspects are well-founded and connected with each other, but nevertheless evoke some critique. On the one hand, self-directed learning indeed seems to encourage increasing intrinsic motivation for (professional) learning and to promote success of long-term transfer. Self-reflecting processes and learner induced evaluations of goals and learning strategies prove to enhance the learning process. Better motivation, transfer and autonomy is found to improve the quality of learning (Krapp et al., 2000) and should guarantee higher performance and flexibility shown later at the workplace. These aspects help self-directed

learning to become and remain a favoured educational philosophy. On the other hand, critics of the concept claim that (old) humanistic ideals are now being abused to simply offload the responsibility for the learning outcomes on the individual learner. And, to make matters worse, that the learner is then left alone with this responsibility and with her learning process (Kraft, 2002). Connected with this may be the hope that vocational teaching institutions could save money. The critics' main reproach here is that humanistic philosophies may be exploited for economical profit.

In the following we intend to show and integrate positive and negative aspects of self-directed learning in the area of industrial apprenticeship programs. We work out the chances for enhancing self-directed learning in vocational training, as well as the limitations.

Some theoretical background on self-directed learning

What is self- directed learning? And especially what is the "self" in self-directed learning?

In our opinion another discussion about the correct definition of self-directed learning does not help in this context - even though definitions, demarcations and interpretations are still plentiful and not handled in a consistent way (Kraft, 2002). For structuring the debate, it might be more useful to distinguish between extra-personal descriptions of self-directed learning processes, like the choice of time, location, social contacts etc. (Weinert, 1982) and intra-personal requirements, like motivation or cognitive and metacognitive strategies (Straka et al., 1996).

A frequently used extra-personal description by Weinert (1982) explains self-directed learning as self-determination of (1) learning objectives, (2) learning time, location, speed and strategies, and (3) evaluation concerning the learning process. This description is still relevant for describing the external factors. In general, self-directed learning means that the learner has influence on her own learning process. One possibility to differentiate the various degrees of self-directed learning therefore would be to evaluate the level of self-determination in the external factors.

Another way would be to give substantial intra-personal processes of learning more attention. An approach for doing so is to regard the question Deci and Ryan (2000) asked: "What is the *self* of self-directed" learning? Deci and Ryan replied with reference to self-determination theory and constructed two contrasts: "self-determined" versus "controlled". They examined these two states on their level of involved intrinsic and extrinsic motivation. Deci's and Ryan's resulting motivation theory indicates that people can feel self-determined even when driven by extrinsic motivation. Thus the grade of self-determination

does not necessarily depend on the underlying motivation but on the subjectively perceived amount of control or possibility of choice.

From this point of view, then, the "self" in self-directed learning consists of the set of integrated values, motivations, beliefs and knowledge structures that are either originally intrinsic to a person or have been taken in, identified with, and assimilated.

As one consequence of this line of thought it does not make sense to construct a strict dualism between self-directed and controlled learning, because even extrinsic motivation can cultivate perceived self-determination. Instead, considering a theoretical continuum between the poles of self-direction and control by others helps one to understand that aspects of self-determination are included in each learning process as well as aspects of direction by others (Deitering, 1995).

As another important consequence it is not distinguishable for outsiders with certainty whether self-directed learning or controlled learning takes place in a given learning process. Only the learner involved can determine how his learning is realised.

Therefore the focus should be placed on the necessary requirements for self-directed learning, which are: experience of autonomy, of competence and of relatedness (Deci and Ryan, 1993). Further, the design of learning contexts and conditions that support these requirements for feeling self-determined are vital.

Benefits from self-directed learning

As already mentioned there are two main reasons for promoting self-directed learning:

1. Economic considerations of industries to improve human capital with regards to competence and flexibility in order to ensure market success by excellent service and high product quality in the long run.
2. Humanistic demands focusing on individual development by self-determination of learning processes.

From the latter educational/humanistic perspective the benefits from self-directed learning can be organised into the following global aspects:

- Self-directed learning helps to generate more self-reliance and responsibility for lifelong learning and enhances the motivation for it.
- By improving cognitive and metacognitive skills through self-reflection and external reflection of learning strategies, long-term transfer is ameliorated and higher loop learning is achieved in self-directed learning processes.
- Self-directed learning improves key competences like the ability to handle uncertainty or to make decisions even in poorly defined situations and contexts.

Advocates of entrepreneurial reasons also advance self-directed learning for humanistic aspects but in the end they have to produce economical gains through it as well. Essential arguments for self-directed learning therefore could be:

- Self-directed learning helps to develop superior competences for more self-reliance and flexibility in changing environments. This increases motivation for higher quality of learning and improved working outcomes. Necessary life-long learning is induced.
- Self-directed learning settings save time and money compared to costly traditional learning settings.
- Self-directed learning creates a learning culture which emphasises responsibility of and co-operation between workers and therefore enhances continuous improvement processes.

Both lines of reasoning – the economical and the educational – are well legitimated and indeed often connected. Individuals are integrated into organisations, benefit from them and rely on them as the source of their income. Organisational systems for their part need a culture, rules and structure as well as determined cycles of action and production to assure their survival (Luhmann, 1984). Personal learning in organisations therefore is essentially subject to the organisational framework.

To support self-directed learning referring to humanistic and economical issues, the needs of the organisational system itself are as important as individual requirements. In the following chapter the most important preconditions for the realisation of self-directed learning at the individual level and for organisations are discussed.

Realisation of self-directed learning

Theoretical considerations: Enhancing motivation and reflection

A number of studies affirm substantial correlations of autonomy and competence-supporting-contexts with self-directed learning in the field of schools, universities (Konrad, 1996), or professional development (Bagusat, 1998).

Deci at al. worked out three factors which clearly support the individual's perception of self-determination, namely:

- a meaningful rationale for why people are being asked to perform a task
- an acknowledgement that they might not find it interesting
- an interpersonal style that emphasises choice rather than control (Deci et al., 1994)

In summary, a high correlation between behavioral self-determination and self-reports of perceived choice and enjoyment of the activity can be found. These results are important in two ways. First they open up possibilities to support persons' inner resources for self-directed learning. Second they suggest social conditions that encourage self-directed learning.

Other important factors of learning successfully, especially in self-directed settings, are cognitive and metacognitive learning strategies (Vögele and Wild, 2002). Improving reflection processes is likewise important and demands concepts for training as well as concrete tools for practising (Schön, 1988).

Supportive concepts and methods used

Individual support

Among others Tough (1979) and Knowles (1975) offer helpful resources for learning essential knowledge and skills for self-directed learning. Both provide step-by-step models for carrying out self-learning projects. These models assist and counsel learners with the selection of realistic learning objectives, the planning of the learning process and with the assessment of its outcomes. Other supportive tools can be "learning contracts" (O´Donnell and Caffarella, 1998) or learning diaries (Greif and Kurtz, 1996). A special training of reflection designed by Loedige-Röhrs and Straka (1994) provides a step-by-step training to enhance individual competences for self-reflection and evaluation of learning to improve the ability of evaluating goals, strategies, mistakes or success within learning processes.

Learning arrangements in organisations

Individuals are confirmed elements of organisational systems. Organisational systems for their part build the necessary framework for the individual, they provide possibilities to identify (or not to identify) with, they present objectives and structures, rules and expectations as to the outcomes of working. In doing so, they reduce troublesome complexity of choices, contents or rules for the individual (Dürr, 1994). As a result, organisations build up a social structure within which individuals can develop and increase self-determination.

Organisational environments which support self-directed learning provide possibilities for the individual to experience autonomy, competence and relatedness (Deci et al., 1994). By breaking down grades of hierarchies and offering more holistic working processes organisations should enable workers to receive more voices, get more responsibility and gain more insight into comprehensive tasks. The learning of individuals in close connection with social influences of co-operations and communities becomes a key factor in organisational cultures (Brown, 2001). New management concepts therefore closely refer to learning, for example, the concept of the "learning organisation" or "knowledge management". They use applied methods like shared learning platforms, interdisciplinary team-work, "islands of learning", business games or centres of self-directed learning.

Computer-based trainings

A decisive opportunity for enhancing self-directed learning is the use of good multimedia and e-learning concepts. Advantages like independence from time and place are as important as the didactical possibilities. Euler (2001) mentions a series of didactical benefits like more demonstrative presentations, higher learner activity, individualised learning, effective training of the learner to learn self-directedly, new forms of interaction (tele-tutoring, newsgroups, virtual seminars) and new forms of co-operation. Admittedly he may be misleading his critics by indicating that multimedia can substitute face to face learning environments. Yet various studies evidence that real life presence is still very important for learners and not completely exchangeable with virtual settings. Consequently the role of the trainer is enlarged, involving both virtual tutoring and face-to-face mentoring. Her task changes from instructing to mentoring or counselling self-directed learning processes (Siebert, 2001).

An example: Self-directed learning in the apprenticeship training – learning with the Allianz Learning Framework (ALF)

Basic vocational training in Germany

In Germany, apprenticeship as the first step of vocational training has a long-standing tradition being organised through co-operation between the German state and private enterprise: the dual system (Bundesanstalt für Arbeit, 1994; Bundesinstitut für Berufsbildung, 1996). Vocational profiles are defined by law and nationally recognised certifications are issued by official authorities. In contrast to other countries, vocational education is partly provided by state run vocational schools and partly by business enterprises. Vocational schools primarily instruct theoretical knowledge while companies train technical and social skills, applied knowledge and knowledge of methods. Additionally, company and market specific knowledge is taught by the enterprises.

This combination provides a wide yet deep foundation with a high quality mixture of theoretical and practical knowledge (Berufsbildungswerk der Deutschen Versicherungswirtschaft BWV e.V., 1990).

Self-directed learning as a principle of Allianz apprenticeship programs

An example of self-directed learning, which connects all three factors described above, i.e. personal and organisational aspects as well as computer based advantages - is realised by the German insurance and financial services provider Allianz, which established self-directed learning very early as an important principle for the apprenticeship programs.

For a large service-based enterprise like Allianz, a high quality apprenticeship system is of great importance: It is the only way to secure the amount of well qualified future employees that is needed for the company to be successful in the long run. Employees who complete their training at the company will not only have profound knowledge of financial business and markets. They will also know very well the specific products, processes and branches of the company and they will highly identify with the enterprise (Dirks and Bagusat, 2000).

Yet specialised knowledge is not enough (Bagusat, 1998). Apprenticeship also focuses on social skills and knowledge of methods. Independent thinking, the ability to communicate, the ability to work in a team as well as problem-solving skills are key qualifications. Flexibility and service orientation are to be furthered in vocational training, as well as the ability and willingness to make decisions and the approach to act as an entrepreneur. Procedures have to be studied from different points of view, and multiple ways to reach a goal need to be practised. The use of diverse media and technical equipment is part of the apprentices' daily work. The basis for an achievement of all these key qualifications is, of course, the individual's competence to learn, the ability to organise and successfully carry out one's own learning processes (Reinmann-Rothmeier and Mandl, 1996).

Considering these demanding objectives, it becomes clear that classical school-arrangements should be avoided within apprenticeship programs. Instead, basic vocational training at Allianz follows the principles of self-directed learning. Every apprentice takes part in planning, carrying out, controlling and assessing her learning process. The learner is seen as the person who is responsible for her development. Of course she gets all the necessary support from her trainer. The trainer takes over the role of a coach. She counsels the apprentices and consults them in all matters and questions of their learning and development. Trainers need to have the will and capability to support each single apprentice at the right time and in the individually right way.

The concept of self-directed learning at Allianz also includes a broad variety of teaching/learning methods and media. In addition to projects, case studies or educational conversations, the apprenticeship also consists of presentations, group work, discussions and role-plays. E-learning takes place as well as face-to-face interaction.

To enable the success of such an apprenticeship arrangement based on the principle of self-directed learning there has to be an appropriate environment. Freedom to apply self-directed ways of learning, possibilities to gather information, to choose suitable methods, to co-operate and finally to evaluate the achieved improvements must be provided (Freimuth and Hoets, 1996; Jerusel and Greif, 1996). Therefore, from the beginning of the apprenticeship program, time and energy is invested so that the apprentices acquire the ability to

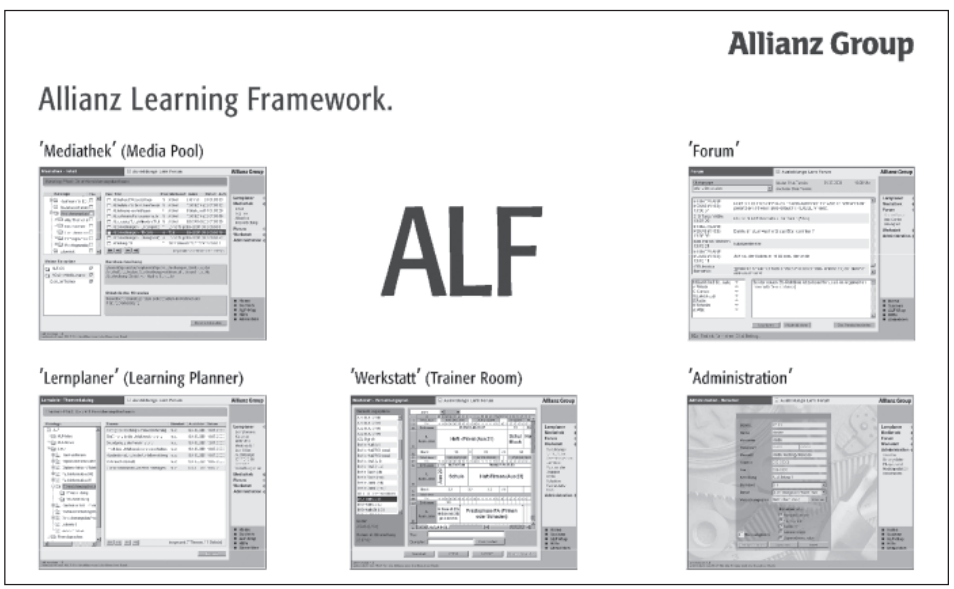
learn and to master self-directed learning processes. Knowledge about useful methods and media, the ability to reflect deliberately on one's own learning processes and to organise them in an individually optimised way are trained as well as cognitive and metacognitive skills.

Through all these means and measures, many important aspects (like the choice of learning methods, time, social form, focus of content, or the learners' taking responsibility for the different phases of their learning processes) can be realised. Nevertheless, for Allianz, Weinert's (1982) definition of self-directed learning represents an ideal: It must be acknowledged that learning in the apprenticeship system never can be completely self-directed. Regulations concerning content and duration are given by German law, absolute choice of learning-objectives is neither possible nor ingenious.

Allianz Learning Framework (ALF)

To further improve basic vocational training, Allianz decided to develop a supporting learning and communication platform that meets the specific demands of the apprenticeship programs – Allianz Learning Framework (ALF). ALF transforms the idea of self-directed learning into an useable tool for individual learning in organisational contexts.

ALF is a Germany-wide learning and communication system based on modern computer technology and networks. Based on the Allianz intranet, it makes good use of the available technical infrastructure and is accessible via any working station. Principal user groups are trainers and apprentices. ALF provides five essential main functions.



1. 'Mediathek' (Media Pool)

The 'Mediathek' forms the central part of ALF. It represents an extensive information pool containing all materials relevant for the apprenticeship training. Texts, web based trainings and slideshows can be found there, as well as instructions for role-plays, reports on projects, screenshows and more. Every document in the 'Mediathek' is described as to length, target group and hints for use; for easier use a short abstract also forms part of the description.

2. 'Lernplaner' (Learning Planner)

The 'Lernplaner' is a highly individualised tool to develop learning processes. Every apprentice has access to her own planning tools. Trainers give suggestions for objectives and how to reach them. The apprentice can choose and plan her individually relevant objectives. She can organise and document her learning process. Ideas for effective learning can be found in the 'Lernplaner' as well as recommendations for the appropriate use of various media. A personal agenda, which is linked to the planning tools, completes this section.

3. 'Forum'

The 'Forum' is ALF's most interactive function. Trainers and apprentices communicate on all topics of basic vocational training. Chat rooms for well defined or open groups exist, newsgroups allow organised discussions on all points of interest. Specialists' consultations are offered. Using the 'Forum', apprentices from all over Germany work together on virtual projects, exchange information and develop new ideas. For the trainers, the 'Forum' provides an important means of co-operation.

Two additional functions are accessible for trainers only:

4. 'Werkstatt' (Trainer Room)

Trainers can develop recommendations for learning objectives and possible structures of learning processes in the ‚Werkstatt'. They can prepare documents for the ‚Mediathek'. The ‚Werkstatt' is a good place to develop tests for the evaluation of apprentices' success and exercises for learners.

5. 'Administration'

In the 'Administration' function user authorisation can be created and maintained. User groups can be defined and arranged. Thus it can be assured that everyone working with ALF has access to the relevant functions she needs.

Evaluations and experiences with ALF

Before ALF was fully implemented in the German Allianz companies in 2001, the system and its impact was evaluated systematically in a one year test phase with approximately 800 apprentices and 80 trainers. The evaluations[1] included repeated mail questionnaires, telephone and face-to-face interviews.

A quality evaluation helped to gain insights for the further optimisation of the system and the methods of implementation. They formed the basis for the improvement of usability and system performance. In addition a result evaluation was carried out to find out about the acceptance and the usefulness of ALF as well as about the impacts of ALF on self-directed learning and on the learning culture in the apprenticeship system.

Results (1): Advantages of ALF

1. Saving time and preserving knowledge

Allianz apprenticeship programs are organised in a decentralised manner. Therefore, in the past, local trainers in general had to develop their own training materials and basically had to work on their own. Co-operation between trainers from different locations was rare and depended on personal connections. When a trainer left her job she usually took her training materials and instruments with her. Thus a lot of work had to be repeated many times (Dirks and Bagusat, 2000).

With ALF there is now an effective way to retain the knowledge within the sector of basic vocational training. In the 'Mediathek' materials can be saved easily, and trainers can comfortably exchange information and experience. Knowledge can be generated, shared and organised. A knowledge pool for basic vocational training is provided, and opportunities for synergy are created. Co-operation and communication among trainers, specialists and apprentices is enabled no matter where the individual user might work.

2. High level of quality

With ALF, information can be kept up to date easily. Trainers work together to ensure the correctness of contents and ALF users provide each other immediate feedback on the quality of inputs. Centers of competence act as specialists providing specific knowledge, high quality materials and co-ordination of the various contents.

Not only can a rising quality of the learning contents be registered. Content-independent competences like decision-making skills and self-reliance on the part of apprentices are also improving. An important side-effect for both trainers and apprentices is the increase

1 unpublished evaluations by Allianz Vers.-AG

in IT-competence: Trainers and apprentices learn to use and to make use of the functions and advantages of new media.

3. Steps towards a modern learning culture

With ALF, roles and opportunities expand: Trainers and learners can develop their training schedules in an individualised way. They have access to material for the application of various methods. Different ways to reach an objective are suggested and described in ALF. The learners get increasing chances to take over responsibility and to create their own learning process as is most suitable for them. ALF effectively supports the needs and demands of self-directed learning.

The trainer does not have to spend as much time as before on the development of training materials or on controlling the apprentices' success. She can concentrate more on interactive and creative aspects of vocational training and become more of a coach and a consultant for the apprentices.

Results (2): Challenges

1. Apprentices: Learning self-directed learning

Practical experience confirms theoretical approaches to self-directed learning. Self-directed learners need instruction about the medium, the methods and in general – at least in the beginning – help in learning to act and decide independently. Initial problems like fear of the new instrument, difficulties with organising one's own work or the inability to co-operate effectively can be registered and must be solved through trainers' mentoring.

2. Trainers: The new role as coach

The trainers must also get used to working with new technical media and have to develop in the culture of self-directed learning. This teaching model differs highly from the traditional approach of instruction and it takes some time until trainers get used to it and feel confident about it. Difficulties for trainers also arise from the dilemma of supporting and instructing the apprentices versus letting them mature through exposure to their problems. The right manner and point in time for intervening has to be found.

Finally, for both groups, self-directed learning induces a similar challenge: How can trainers and learners be sure to teach/to learn the right things in the right time?

By the end of the year 2000 ALF was already a highly accepted and appreciated learning and communication system in the apprenticeship system. Due to the positive findings of the evaluations, ALF was completely implemented in the German Allianz companies in 2001.

Conclusion

Self-directed learning can form a valid foundation for a professional learning system, i.e. the apprenticeship programs. Learning can be extended by personal and organisational aspects as well as by computer based influences as realised in ALF. Benefits of self-directed learning especially in extra-personal aspects can be found in the applied learning setting.

To sum up: Can self-directed learning enhance professional learning? ALF proves – concerning the specific area of basic vocational training – that the theoretically founded concept of self-determination can be realised and used in practical professional learning. The theoretical concept is naturally restricted by factual constraints and practical limits but nevertheless fulfils many of the expected functions from a humanistic and also from an economical point of view.

Next steps for research

So far mainly extra-personal aspects have been illuminated, i.e. the learning process is described from an outside perspective and defined as self-directed. The benefits of self-directed learning concerning other extra-personal components like the quality of content, the saving of time and knowledge etc. have also been worked out. A next question could refer to intra-personal processes - that is, aspects of the „self" and effects of self-directed learning.

Intra-personal aspects of self-directed learning

For working out intra-personal aspects of self-determination it is useful to include the "self" of self-directed learning. As already mentioned, it is not identifiable for outsiders whether learning is self-directed or controlled and it also is not ascertainable which degree of self-determination is taking place.

Thus further questions could be:

- Do learners in their special context really feel self-directed and if so
  (a) to which degree and
  (b) which factors enhance this perception, regarding the aspects that foster self-determination?
- Which clues for the success or failure of self-directed learning can be deduced?

Intra-personal effects of self-directed learning

Another aspect could be the intra-personal effects of self-directed learning. Many details about objectives and expectations of self-determination exist. However, so far most studies examine concepts and requirements, terms, measuring and implementation of self-

directed learning. Evaluations about effects like higher quality of learning, long-term transfer or the development of competences in connection with self-directed learning are very complex and rare. Contexts therefore mostly concern universities and should be extended to vocational and professional learning.

Interdependence between the individual and the organisation

It would also be interesting to measure personal effects of self-direction in the context of professional learning and possibilities to integrate their outcomes into daily working life. The influence on organisations' configuration and culture could be evaluated and it could be examined how self-determined individuals participate in organisational changes.

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PORTALS AS A MEANS OF INNOVATING EDUCATION

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Abstract

Rapid development of information and telecommunication technology (hereinafter: ICT) in the few last years has opened new possibilities for enhancement of efficiency and effectiveness in learning and teaching. The use of up-to-date ICT, especially the Internet, has influenced not only distance education but also traditional education settings. This can be seen from growing number of on-line courses and educational web portals of both types of educational institutions. Web portals have become an important information source in supporting the development of education, and their importance is still growing. In the first part of the paper the meaning of educational portals, their definitions, various types of educational portals and their functions will be presented. In addition, some evidence will be given as to what might be the services offered by portals, how the portal content could be managed and how the personalisation of portals might be achieved. In the second part of the paper, the development of the e-learning portal in Slovenia will be presented. The development of the e-learning portal is one of the sub-projects within the project Distance Learning in Slovenia started in 2002 and financed by Ministry of Education, Science and Sport. This project aims to elaborate a comprehensive national e-learning strategy, targeting on all educational levels. Within this frame, the role and the concept of the e-learning portal in Slovenia will be discussed and the initial working version will be presented.

Introduction

One of the most significant characteristics of modern societies is the constant need not only to revise and update knowledge, but also to upgrade skills. The need to continuously revise and update knowledge also results in necessary revisions of the old and development of new pedagogical concepts and delivery formats, adapted to the needs of adults. Arising from these needs, traditional distance learning was successfully introduced several decades ago.

With the recent fast development of ICT, this traditional form of distance education went through the process of transformation and adaptation to emerge as a new concept of e-learning, applicable also in traditional education and depending heavily on the advantages of the Internet. One of the most propulsive and expansive tools for efficient use of Internet is portals. Although primarily developed in the business sector as a means of e-commerce support, they are increasingly recognised as a means of innovating education[1].

In this paper, the basic conceptual issues, role and functions of educational portals will be examined first. In this frame, the rationale for development of the e-learning portal in Slovenia and current achievements will be presented. Discussion on perspectives and open issues about further development of the e-learning portal in Slovenia will conclude the paper.

Basic concepts and terminology: e-learning, web-based learning, websites and portals

The advent of the Internet and the invention of the WWW, supplemented by a wide and growing range of multimedia technologies have created particularly during the past decade a platform for introduction of the distance education concept in traditional on-campus education processes, thus effectively changing educational paradigms.

The changing educational paradigm is characterised by the fact that teachers no longer hold an exclusive monopoly over knowledge.

Contrary to the traditionally recognised role as being a subject-matter expert transmitting knowledge of fixed and precise contents to learners, the teacher is becoming a moderator, advising the learners how to discern relevant information in the cyber-cauldron and how to transform it into new knowledge. New opportunities and challenges are offered to main stakeholders in the learning process: learners, to actively shape their study paths and content; teachers, to extend knowledge sources beyond traditional pools and to enrich and innovate their teaching experience by ICT.

1 In the Educause survey 2002 (Olsen, 2002) the education technology consortium ranked institutional portals fourth among the top – 10 technology issues in the next 12 months.

Under these circumstances, the relationships among participants in educational processes have been changing dramatically. Teachers' and students' roles are interdependent. If the roles of the teacher are those of moderator, tutor, collaborator with a learner, then learners need to become self-reliant, more active in searching for relevant information. The role of a self-reliant student is the corollary to a less directed role of the teacher. This raises the level of learners' responsibility in learning (Barajas et al., 2003) and opens new opportunities for affirmation of distance education concepts, one of the premises of which is an independent self-reliant learner.

Distance learning and traditional on-campus learning formats have been merging and re-emerging as open learning, flexible learning, resource - based and/or distributed learning. This technology-based modernisation of educational systems is being described as **e-learning** (Glossary of Technical and Distance Education Terms, 2002; Kaplan-Leiserson, 2002), although it could also be referred to as **technology-based learning**. E- or technology-based learning covers a wide set of applications and processes, such as web-based learning, computer-based learning, virtual classrooms, and digital collaboration. It includes the delivery of the content via Internet, intranet/extranet (LAN/WAN), audio- and videotape, satellite broadcast, interactive TV, and CD-ROM.

Web-based learning (often used as a synonym for on-line courses) thus represents one possibility from the range of technology-based learning options. It is characterised by the use of a web browser to explore public Internet sites, a private intranet, or an extranet (Kaplan-Leiserson, 2002).

Delivery of educational content runs via a Web browser over the public Internet, a private intranet, or an extranet. Web-based learning often provides links to other learning resources such as references, email, bulletin boards, and discussion groups.

The introduction of a new learning paradigm in digital environment is accompanied by development of new tools. Recent trends prove that portals are becoming an increasingly needed technology means of Internet information management, providing a "central online tool to access and exchange internal information as well as a link to external information, vendors and resources according to the needs, mission and choice of institution" (Norman, 2003).

Portals: definitions and classifications

What are portals? Oxford Advanced Learners' Dictionary defines a portal as large, impressive gate or entrance to a building. Similarly goes Winston Dictionary, defining portal as a gate, door or entrance, especially one that is stately and imposing, as of cathedral. What does this metaphoric use of the term portal mean in the context of the Internet and

WWW? One could imagine that the portal admits entrance and a tour to immense and chaotic cyber space.

What is the essence of a portal – but not discerned in the metaphor itself – is the *distinctive advantage* of the portal over Web site, e.g. that this tour is *organised according to the particular needs of a visitor.*

This feature of the portal is also accentuated in a few glossaries already containing this novel term.[2] For instance, Learning Circuits Glossary defines portal as a web site that acts as a doorway to the Internet or a portion of the Internet, targeted towards one particular subject. CISCO glossary says portal is a specific view into the website that matches person requirements to the available offerings.

At the most basic level, portals gather a variety of useful information resources into a single 'one-stop' Web page, helping the user to avoid being overwhelmed by 'infoglut' or feeling lost on the Web. But since no two people have the same interests, portals allow users to customise their information sources by selecting and viewing only what they find personally useful. Some portals also let you personalise portal by including private information, e.g.: checking private account balance (Looney & Lyman, 2000). Shortly, portal is a layer, which aggregates, integrates, personalises and presents information, transactions and applications to the user according to their role and preferences (Dolphin, 2002).

Historically, portals have been developed from search-engine-based sites (e.g. Yahoo, Excite; Lycos) and Internet service providers (e.g., AOL, Earthlink, Prodigy). But the value of portals goes far beyond a Webpage containing a directory of URLs. Portal is a home base, anchor, a place to return to when you get lost, a place to keep your information, a place from which to communicate with others. (Looney & Lyman, 2000).

In practice, very often more or less static web sites are declared as portals. Internet search discovers thousands and thousands of hits under the term 'portal', but only a part could be recognised as a portal in the defined sense. For appropriate comprehension of the role and potentials of portals, it is worth clarifying the differences between *Internet websites, intranet and portals.*[3]

An *Internet Web* site is the most basic manifestation of Web technology, providing information through hypertext mark-up language (HTML) that allows for cross-referencing with hyperlinks. Consumers worldwide can access the Internet. Thus the information presented on the Internet Web site is intended for public consumption without restrictions.

2 Interesting to note that our ad-hoc Internet search on portals definitions did not discover the required heading (portal) in European Internet glossaries available on-line but only in American ones.

3 For detailed explanation see article: Christopher G.Connolly: From Static Web Site to Portals.

An Intranet Web site is one that is contained within an organisation. Its purpose is to provide more relevant, useful Web-based solutions to an internal community. People have access to an intranet thorough an authentication process, usually involving usernames and password. Intranet affords a way to present information to a restricted audience.

A *portal* is a gateway to the Web that allows the plethora of information available on Internet and Intranet Web sites to be organised and customised through a single entry point. Dolphin (Dolphin, 2002) argues that it is fair to say that the line between intranets and portals appears to be blurred. He suggests that an intranet should be considered a portal when it can *aggregate* and integrate *diverse sources* of information.

The technical aspect of portal design deals with the issues of integrating various software applications. *The content (information)* aspect is focused on how to organise data retrieval, storage and delivery to users' needs. In this paper the discussion is limited to the latter aspect[4].

Portals can be roughly divided into two major groups: general and specialised. *General portals* such as Yahoo, Excite, CNET, AOL, BBC portal, or Najdi.si in Slovenia offer a range of services, from news, sports and weather, to e-mail services, chat rooms and most importantly search. The searchable database has been usually bought through a partnership with one or more dedicated search engines or directories, such as FAST, Google or Looksmart.

Specialised portals target special interest groups (the so called *community portals*) or certain segments of consumers (*consumers' portals*). Consumer portals are mainly commercially oriented aiming to capture internet traffic of potential or actual consumers by organising internet content according to consumers' interest. In community portals, information is aggregated, edited and organised around specific topics, which concerns certain well defined groups of people (Looney and Lyman, 2000).

Educational portals can be met on both sides of specialised portals. The learning Circuit Glossary defines learning portals as any Website that offers learners or organisations consolidated access to learning and training resources from multiple sources. Operators of learning portals are also called content aggregators, distributors, or hosts.

Butcher (Butcher, 2002) classifies educational portals by purpose into three groups:

- networking portals,
- organisational (institutional) portals,
- resource-based portals.

Networking portals provide various individuals (educators, learners, managers, and administrators) with a central point from which to access educational tools and facilities (on-line

4 Today's portals are an applied technology application based on existing technologies. Currently, most portals are simply several underlying technologies packaged together that are fairly simple to develop (Connolly, 2002)

and offline). As cases of interesting networking educational portals, one may mention *e-learning europa, E-content village, Eduscapes.*

The typical ingredients of a networking portal are: reference section, containing also generic resources such a dictionaries, directories, thesaurus, glossaries, maps; and resource section. The latter could be further split into various categories[5] for instance: links section, newsletters informing about the progress on various projects or activities of an organisation, discussion groups, technical and professional support. Very often, access to the major part of a networking portal is free, but a subscription section is also offered to those who are interested in-depth specialised information.

The prevailing types of educational portals are organisational portals in the higher education sector. An organisational (institutional) portal is constructed by a specific organisation whose core business is to deliver educational material. Some illustrative examples of institutional portals are *University of Washington, Open University* (International Center for Distance Learning), *Faculty of Economics, University of Ljubljana.*

Generally, these portals contain background information about the organisation, its mission and strategy, founders, members and staff. Organisational portals offer a considerable amount of information on products and services rendered by the institution in order to attract users to buy their services. Quite often, organisational portals are overloaded by commercial advertisements, threatening to distract navigators and lead them to other web sites.

Resource-based portals provide access to various educational resources online. Generally this group of portals contains adequate search facilities, with links to other relevant organisation as well as subscription services. The overwhelming feature of resource-based portals is that they provide subscription services, thus requiring payment to be made before being able to access resources. In many ways, resource-based portals are simply a subset of networking portals *(e.g.: Eduscapes).*

Elements of designing educational portals

The brief survey of definitions and meaning of portals in the previous section pointed out that at the achieved stage of portals' development, no common conceptual definition exists, and the available *definitions* more or less rely on the *purposes* to which portals are put.

Nevertheless, most appear to agree with Butchers' view (Butcher, 2002) that portal represents a resource gateway, which has been designed in such a way that it selectively filters

5 Eduscape classifies educational portals into general education portals, education portals of subject area resources, thematic starting points and subject area and grade level portals.

and organises useful, relevant information. In this way, a portal allows users to easily navigate towards areas of interest as opposed to having to 'surf' the Internet in a random and less focused manner. In this way, portals foster effectiveness and efficiency in Internet use.

In what way a portal will increase effectiveness and efficiency in Internet use depends on the objectives and strategy embedded in the development of a portal.

More explicitly, before considering the range of possible functionalities and services that an education portal might provide, it is important to introduce a *key strategic choice* that needs to be made regarding the portal and its content. This choice revolves around whether or not portal developers decide to use the portal only to provide *access to content available elsewhere* on the Worldwide Web, or whether the portal becomes a *mechanism for organising content commissioned and produced through the portal itself*. The first option concerns mainly networking portals, the second one addresses organisational (institutional) portals. However, the choice is not an exclusive one in practice, and both options are interrelated in the process of development. Very often, the development of a portal starts with organising and managing the content developed by the institution and then continues to offer links to the best content available on the web (Butcher, 2002).

The principal orientation of a portal developer as to whether to design a networking portal or an institutional portal ultimately depends on the developer's *basic mission*. Educational institutions competing at educational market for prospective customers of educational services will subject the portal's physiognomy to facilitate access to the content produced by themselves, in the format of various educational programmes and other services. By contrast, public organisations and various associations whose prime mission is to foster education in general, not being exposed to the market pressure will mainly follow the networking portal concept.

Along with this general line, a range of factors have to be considered when embarking on design in practice. Although tempting 'to provide' a universal portal (all things for all people), a decision on the principal target group must be made. After a general decision, as to which type of portal should be developed and for whom, several external circumstances must be appropriately accounted for. For instance, factors such as the spread of information technology and access to internet in the environment, general level of information and internet literacy, general level of acquaintance with subject area covered by the portal, financial resources available in the short and long run, organisational sustainability of a portal developer etc. must not be overlooked when shaping networking portal.

The introductory stage of portal development is followed by selection of portal services, which will shape the portals' principle functionalities, which can be roughly grouped into three segments:

- content services,
- content management services,
- communication services.

In the next section, a summarised description[6] is given of portal services supporting content, content management and communication.

Specification of portal services

Content services

By and large, the information value of a portal is ultimately determined by the range of content services available.

Online course catalogues (directories) contain information about possible learning pathways available online or traditionally on campus, providing browsers with ideas about the educational programme currently available at local or international level.

Online education courses provide a means for learners to take part in courses; it offers equal opportunities and access to various learning environments.

Electronic library provides both educators and learners with access to various online resources and links to other sites, available freely or by payment.

News services containing information about news on the portal (notice board), relevant articles (on educational policy, innovative projects, school reform, links, mainstream news, current events etc.).

Content Alert Services offers opportunities for asynchronous interaction between the user and the information provider (e.g.: e-mail messages on certain topics are sent to users).

Customisation - users receive information for or about themselves. For a student, this might be a schedule, degree checklist or reminder from the library.

Personalisation could be regarded as an ultimate goal of the portal – providing that the right content is given to the right person at the right time – and as a mechanism to promote effectiveness and achieve long-term usefulness through remembering the user. Personalisation usually requires user identification, user registration, user security policy, role definition, user administration, tracking use and user support.

Search facilities are fundamental for the primary objective of the portal, i.e. to facilitate access to resources, either internally or externally generated. Different search modes are available, for instance:

- Free text search, related resources/ documents search containing a specific word or phrase;

6 Detailed description is given in Butcher's and Butters's articles.

- Image search retrieving image containing a specific word or phrase;
- Structured search retrieving content, based on a defined taxonomy system.

Content management

The important factor of an efficient and successful portal is adequate management, striving for a balance between prompt inclusions of fresh relevant information and omitting information already available elsewhere. Content management of portals usually relies on the following services:

Resource pool - content available through the portal stored as a single pool of electronic documents and described by metadata and taxonomy.

Taxonomy - defining multiple hierarchical taxonomy trees to which content can be associated.

Content upload - allowing geographically dispersed contributors to fill in the portal in a secure mode. Contributor Toolbar, which would permit contributors to make submissions while viewing a resource, could substantially increase the efficiency of this service.

Quality assurance - approval by content reviewer of submitted contributions to be included in the portal; this service could be supplemented by users' rating of content available. Another aspect of quality assurance is detection of malicious content either technologically (e.g.: viruses) or because of inappropriate content (e.g.: pornography, hate speech).

Communication services

In terms of the educational process, the capacity of Internet technologies to support a range of communication strategies of synchronous and asynchronous communication between educator and learner and amongst learners is of particular importance. A wide range of applications is available, from individual electronic messages, to chat rooms, videoconferencing and discussion forums.

Development of the portal in the frame of project distance learning in Slovenia

Development of the e-learning portal is a part of the project Distance Learning in Slovenia. The main aim of this project is to elaborate national strategy in the field of technology based education (i.e. e-learning)[7] in Slovenia. The strategy will consist of recommendations

7 The explanation for the synonymic use of terms 'technology based learning' and 'e-learning' is given in section 2. According to this, e -learning encompasses not only distance but also traditional education. This also holds for the educational fields covered by the Project Distance Learning in Slovenia. In this sense, the project's title is imprecise.

for further development of e-learning covering different aspects of its performance (organizational, didactical, economic, technological, legal etc.). All these aspects will have to be considered as a basis for the introduction of e-learning in Slovenia at different levels of education - elementary schools, secondary schools, higher education institutions, adult education and private sector.

The project is co-ordinated by Laboratory for Telecommunications, Faculty of Electrical Engineering, University of Ljubljana. There are about 15 partners[8] working on different aspects of e-learning included in the project. Most of them are educational institutions (HE institutions) or national institutes. The project has a flexible structure, in the sense that is open to all those institutions and individuals who are willing to support the further development of e-learning in Slovenia.

Expected results of the project are the following:

- establishment of strategic group for development of e-learning in Slovenia,
- development of web portal on e-learning,
- preparation of strategic document – national strategy on e-learning (defining the concept for development of e-learning system in Slovenia),
- increased awareness in the field of e-learning.

The expected benefits of the project are increased possibilities for ICT supported learning, introduction of new flexible forms of access to up-to-date expertise and knowledge for professionals and non-professionals, setting up new efficient channels for promotion of e-learning and fostering innovations in education.

The project activities are running consecutively in thirteen thematic groups, which are further divided into several sub-projects. Project activities are implemented on an interdisciplinary basis; partners with different subject expertise are included. This fact should also contribute to the project quality and its wider perspective. Practical experiences and outcomes will be used as the basis for recommendations. It is envisaged that a strategic group of experts in the field of e-learning will continue with dissemination of project results also after the formal conclusion of the project in 2004, and that it will continue to support the systematic inclusion of e-learning in Slovenia.

In the frame of the project, it is intended to create an e-learning portal conceived as a main information and knowledge resource for all stakeholders in e-learning development in Slovenia.

8 More information on project partners are available at *www.ltfe.org/crp/*

Description of the portal on e-learning in Slovenia

There are three partners responsible for development of the web portal on e-learning[9] – Faculty of Economics and Slovenian Institute for Adult Education (for its content and its functionalities) and Laboratory for Telecommunications (for its technical implementation). The aim of the portal is to serve information needs of various target groups – to institutions and individuals interested on e-learning (students and potential students, teachers, experts willing to up-date their knowledge or acquire new knowledge needed for further development of e-learning, decision makers, management of educational institutions etc.) The portal is based on the networking concept with an important resource component. According to this orientation, priority is given to development of content services. While three partners are responsible for its development, all project partners are invited to contribute the relevant content (articles on distance education/e-learning, different sources with relevant information, etc.).

The portal aims to offer access to a wide range of information. Some of them were purposely created for the needs of the portal, while others were collected from different international and national sources on e-learning. The Slovenian Institute for Adult Education is a member of some international associations in the field of e-learning which regularly provide relevant information. Beside that, the information is gained from professional electronic networks which provide information on a daily basis to its members. The NCP's (National Contact Point for Distance Education) web-site has also enriched the information pool.

The information available within portal is structured into several groups:

- links to the *educational institutions* offering e-learning courses or programmes (in Slovenia and in other countries),
- links to the *international associations* in the field of e-learning,
- links to the *resources* on e-learning available on the Internet (web-portals, electronic discussion groups),
- information on relevant *professional literature* in the field of e-learning (list of recommended literature, links to the literature available on-line, electronic newsletters and electronic magazines, scientific and professional papers),
- information on relevant *conferences*,
- section with information related to *development* of e-learning (links to specialized contents available within on-line sources, links to relevant projects, demo versions on on-line courses and information on training opportunities for staff interested or already working in the field of e-learning).

9 Home page of the portal is http://e-studij.net.

Beside content service, at least the minimum of communication services have to be available to the users of the portal for efficient use. The visitors can contact the partners responsible for development of the portal, obtain relevant news, engage in the discussion forum and information search. Management services are not presented in this paper due to its technical nature.

Open issues and future perspectives

The first activities related to the introduction of distance education in Slovenia started in the period 1991-1993 within the University of Ljubljana, at the University Research and Development Centre and at the Faculty of Economics.

In late nineties the interest in distance education and e-learning in Slovenia was stirred up by the very rapid diffusion of ICT appropriate for educational services with a trend of considerably decreasing costs, and stimulated by awareness raising and training activities implemented within the Phare Multi-country Programme for Distance Education (Zagmajster & Bregar, 2001).

The interest in e-learning has been growing within higher education institutions at both universities. Many higher education institutions implement projects in the field of e-learning, some are developing on-line courses as a means for enriching traditional forms of education and other are experimenting with the use of up-to-date ICT in the pedagogic process.

Apart from higher institutions, there are other institutions embarking on e-learning development at the level of primary and secondary education, mostly as a means for enriching traditional forms of education. The corporate sector also took on board e-learning as an up-to-date mode of education for training purposes. The network of centres for continuing education delivering distance education and e-learning is expanding.

This evident interest in the development of e-learning in Slovenia backed up the idea to develop a networking portal focused on e-learning.

The survey in the first part of the paper, pointed out that the educational portal is a generic concept covering a wide range of its practical implementation and functionalities. Compared to the options which portals can offer to its target groups, the portal developed within the project Distance Learning in Slovenia seems to be modest. It has to be emphasized, however, that the development of this portal is seriously limited by financial sources available to this sub- project. In a way, it reflects the current attitude towards the development of e-learning in Slovenia.

According to the Evaluation (implemented in 2001 by Steinbeis Transfer Centre, Germany), Slovenia is seen as having leading expertise in ICT applications for education and training

within the region of South East Europe. However the number of on-line courses offered by educational institutions is still rather low and investment in ITC-based course is somewhat sporadic.

It must not be overlooked that what is missing at the moment in Slovenia is the existence of a supportive deliberate educational policy fostering e-learning in order to provide stable conditions and keep pace with current trends in this field in Europe. The project Distance Learning in Slovenia aims to fill this gap.

If the objectives of this project are met and the proposed national strategy on technology based education strategy is officially approved and financially supported, the portal developers see the possibility that the portal could continue to develop and to be regularly updated also after the end of the project.

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TECHNOLOGY AND ADULT EDUCATION: NEW TOOLS FOR NEW EXPERIENCES

Barry Sponder

Abstract

In several ways, the field of adult learning is at a crossroads. In many countries the percentage of adult learners either equals or outnumbers all students in public schools while in other regions, the large majority of the population is under 25 with only a cursory collective memory of the recent past. For the most part, children of the digital age are as technologically different from their elders as INTERNET communications are from conventional mail systems. Fortunately, the evolution of educational media with its impact on consumer technology-AND THE REVERSE-has made it possible for powerful instructional tools to be employed that offer new possibilities for adult learning that were unthinkable less than a decade ago. However, educational institutions, instructional designers and adult learners are struggling to utilize these technologies to make a significant impact upon adult learning outcomes.

What are these new tools?

Along with the obvious technologies such as computers, CD-ROMs and the INTERNET, an entire range of new media systems have appeared-both hardware and software-almost unnoticed by educators. Technologies such as digital cameras, hand-held computers, DVD players, digital camcorders, cellular communications, MP3 gadgets, printing machines and other devices have permeated the consumer-market at a dizzying pace. In fact, their use in several areas such as public health, basic research, business, sports, art and entertainment have revolutionized those endeavours and many of these technologies offer the same opportunities for adult education. To go along with this hardware is an equally impressive array of software that has taken the development and use of modern multimedia manipulatives out of the realm of computer scientists and into the hands of the public. In fact, the consumerization of digital technologies is part of an emerging educational paradigm that is obvious in almost every area except education! This article will focus on ways that decision-makers, instructional designers and teachers can use media and multimedia technology more effectively in the creation and delivery of adult education. In addition, several important motivational strategies that are vital to technologically-assisted instruction will be offered.

Introduction

Adult education is at a crossroads, facing new challenges and opportunities that reflect a dynamic, rapidly evolving global technological environment. Although the prospects for using information technologies (IT) as instructional tools are generally favorable, the path has often been unclear with only a few signposts to point the way. In many countries the population of adult learners outnumbers students in elementary and secondary schools however, in other areas the majority of the citizenry is under 25 with only a cursory collective consciousness of the recent past. Not surprisingly, information-age children are often "wired," media-savvy and as different from their elders as the INTERNET is from conventional "snail-mail." In fact, it is not surprising that schoolchildren are sought out as high-tech problem-solvers by their parents, who are often more tentative and insecure when using the same mainstream multimedia such as computers and the INTERNET. Fortunately, the emergence of a new generation of "smart" educational media with its impact on consumer technology-AND THE REVERSE-makes its feasible to employ innovative instructional tools for adult learning that were unimaginable only a decade ago. This is evident in the development and commercialization of the World Wide Web in tandem with the proliferation of consumer-oriented computers and digital telecommunications. Now that an widespread hardware infrastructure is commonplace it is vital to motivate adults learners and educators to move beyond the crossroads in a direction that makes good use of established technology and consumer electronics to support lifelong learning and instruction.

Although there may be a consensus that information technology should be a key component of adult education, effective implementation is often a problem. Because of competing claims for public resources, investments in hardware and software-both by institutions and individuals-must be met with an equal commitment to use them effectively. In addition, there should be easy access to timely, hands-on training and support for participants. However, this does not always take place. One explanation is that the hyperbole used to describe new media systems seldom measures up to the reality of their performance. In fact, the recent history of IT is replete with grandiose and unfulfilled predictions about the paradigm-changing features of latest miraculous media and methods. This has bred predictable skepticism among many in the educational establishment who often see technology as an expenditure in search of a problem or a problem in itself rather than being an instructional solution. In addition, "human factors" such as culture, socio-economics and motivation play an important role in how, and when, technology is used. This paper will touch on some of the useful characteristics of newer, "smarter" media, and their potential as educational tools. In addition, I will discuss some hindrances to their use and offer a few correctives for dealing with technology–related motivational roadblocks.

The consumerization of high technology

Along with high profile multimedia such as computers, CD-ROMs and the INTERNET, an array of new media systems have become available that are rapidly transforming many of life's daily routines. Equipment such as digital cameras and camcorders, printers, scanners, hand-held personal digital assistants (PDAs), DVD players, cellular phones, MP3 devices and other innovations have permeated the mainstream consumer market. In fact, the use of digital media in areas such as public health, business, sports, art and entertainment have revolutionized many of their basic procedures. For example, in the "personal health" field there are professional-grade over-the-counter products that monitor bodily functions such as blood pressure, disease resistance (such as HIV) and blood glucose levels, all of which have helped at-risk populations to maintain healthier lifestyles and, hopefully, live longer. In the US entertainment market more DVDs are sold or rented than videotapes-a remarkable trend for a media format that has only been widely available for a few short years. Is it really surprising that most encyclopedias are no longer sold as books but instead are marketed as online publications and subscription services or available in DVD-ROM or CD-ROM formats? Indeed, digital customization has enabled products such as Microsoft Windows and The Word/PowerPoint/Excel Office Suite to be developed for numerous linguistic contexts as diverse as Slovene, Japanese and Arabic. Furthermore, various magazines, newsletters and journals are published only in cyberspace. Clearly, yesterday's cutting-edge technologies are today's mainstream merchandise.

The technology convergence that fosters many of these trends is rooted in the telephone, one of the earliest electronic innovations. Amazingly, this 19th century creation has been reinvented, reconceptualized and morphed many times over. Nowadays, the telly connects to the computer which links to the radio or travel agency, music store, phone directory, bank and so on. Indeed, the confluence of these systems has transformed the way we carry out many everyday tasks. The significance of these developments is that new and powerful opportunities are available at the consumer level, no longer the purview of "computer geeks" or out of reach of the average user. In fact, these media systems are developed for, and marketed to the general public, making them affordable and easier to operate than ever before. After all, *manufacturers want people to buy their products* so they provide a wide range of assistance and support for users, such as INTERNET websites, online handbooks, product-specific reference CD-ROMS, automated telephone services, how-to-videotapes and even one-on-one phone support. Accompanying this growth in digital hardware is an equally progressive proliferation of powerful programs that have transformed terribly thorny tasks into routine procedures. For example, a person using a digital camera to take family photos can easily transfer the pictures to a computer and erase the

"red-eye" effect from a photograph with the click and drag of a mouse. This image processing software is inexpensive and often a consumer version is distributed free with photos processed on a CD-ROM!

New tools for new experiences

I often refer to current intelligent technologies as "consumerware," because they offer many new and unique experiences and are designed for the mass market. These new experiences can be classified into three general categories which are as follows: *Communication, Customization, Creativity*.

Communication: The exponential growth of digital communications is self-evident with cellphones outnumbering automobiles and satellite communications bringing low-cost long-distance calls within the reach of anyone with a phone, almost anywhere on the globe. These same technologies also offer text messaging and the transmission of pictures and movies over standard telephone lines. Obviously, these options present intriguing possibilities for adult education. In fact, learner assistance via audio, video and text-will never be more than a phone call away. From a constructivist perspective, communicating one's ideas has also never been easier. Using applications such as PowerPoint (for overhead transparencies), or FrontPage and DreamWeaver (for web development) anyone can create professional looking documents. Not surprisingly, these applications include many extras that make them suitable for anyone from a beginner to an expert. Additionally, displaying a presentations is easy as spelling L-C-D since compact Liquid Crystal Display projection devices are now being marketed as reasonable alternatives to big and bulky large screen televisions. While many in adult education have been using these media, it often remains a challenge to master them beyond a perfunctory level.

Customization: As Naisbett (1994) observed, the mass customization of products is one of the major characteristics of the digital revolution. Products can be personalized with a high degree of sophistication giving the user the ability to make subtle, random or purposeful changes during very complex operations. For example, procedures for producing mail-merged documents and address labels for personal correspondence are as easy to perform as printing individualized, customized hardcover books for children. Users need only to master basic software or hardware that is *designed for them to succeed* at tasks such as rubbing out red-eyes in photographs or making movies or animated films that can play on their computers or be sent via EMAIL over the INTERNET.

Creativity: The ongoing growth of computing power, which seems to double just weeks after we bought our latest computer, has enabled ordinary folks to do extraordinary things. From the development of advanced websites to designing our own jewelry, clothes, tat-

toos, homes, etc., both software and hardware are performing as "adjectives" by modifying our talents and sparking latent interests in pursuits that were once out of reach. For example, many new authors have had their start through the INTERNET. In fact, the daughter of one of my students became a successful writer of children's books at sixteen due in part to her work on the INTERNET. Her mom learned to use Tripod, a free web-hosting service in my basic computing course and she soon taught her daughter how to create websites in under an hour. Her daughter later posted several original stories to her personal website. Subsequently she was "discovered" by a publisher, signed to a long-term contract and has had numerous best-sellers to her credit.

Roadblocks to using educational technology

Unfortunately, as adult education continues to mature in its use of technology learners are encountering many motivational problems that are often difficult to address. Unless recognized and overcome these stumbling blocks to scholarship will lessen the effectiveness of any instructional system and ultimately lead to technology-fatigue, lethargic performance or user-burnout.

In an article entitled "Taking learning Seriously," Shulman (1999) offers interesting insights into learning problems and identifies four categories that describe what can go wrong with learning. Encapsulated, they are as follows: *Amnesia*-We forget so much-why is that?; *Inertia*-We learn so much useless information that goes nowhere; *Phantasia*-We know so many things that just aren't correct but we are sure they are true; *Nostalgia*-It was always better "way back then." Taken together these roadblocks are powerful motivational-killers. Interestingly, each difficulty has its own relevance for using-or not using-educational technology. Consider the following:

Amnesia-We can easily develop amnesia when a technology is not used to its potential. For instance, while PowerPoint programs have the ability to integrate text, graphics, audio, video, animation and photographs, many presentations offer all the motivating components of dishwater. They can appear as overly wordy "electronic books," displayed onscreen with the readability and dryness of an eye chart. Many presentations simply display list after list of points, sub points and sub-sub points that soon fade into oblivion. It is almost as though the presenter is saying "What do you want, I'm using technology, am I?" Indeed, more training in the effective design and utilization of presentation programs and other electronic systems would help to combat amnesia. In fact, there are many materials that provide good advice for creating mediated instruction. Williams (1992) offers important rules for using computer-generated text in documents and presentations while Reigeluth (1983) provides examples of a single lesson created from many different design perspectives.

Inertia-With any one of a billion documents accessible by clicking on an underlined word or picture icon, it is all too easy to provide a "kitchen-sink" approach to presenting information to online learners. Information-overload is recipe for giving too much inert information and a sure way to kill the motivation of someone searching for useful (non-inert) information on the World Wide Web. This is an all-too-familiar problem because adult learners are not interested in wasting their precious time hunting through dozens of websites reading text from a luminous screen, only to be sent to yet another website for even more "illumination." In addition, having too few references can create the impression that what is shown here is all that is relevant to the discussion. Combating inertia requires thoughtful audience analysis so that irrelevant information will be omitted from a webpage. It also requires well-organized text/graphic layouts in which the pertinent points will be easily identifiable and not confuse the intended audience. Although computer programs can italicize, bold or underline text easily, Williams (1992) makes the case that each function has an appropriate task but they are too often misused. When entire papers or websites are in bold type, the use of bold loses all meaning. She also points out that techniques such as underlining are vestiges of old technologies such as the typewriter and are not used in professional computer-generated documents. If teachers take the time to learn the proper wordprocessing conventions for using technology they will be more precise in their presentations and less likely to strand their audiences with an overload of worthless information.

Fantasia-Nickerson (1987) tries his hand at "Understanding, Understanding" by examining research about math and science teachers' subject matter conceptual development. Several studies of high school teachers' thought processes have shown patterns of conceptual errors about important topics in their fields of expertise. He uses this research to draw some inferences about what we mean when we say we "understand" something. He concludes that understanding in not a binary concept (yes/no), but rather it develops along a continuum with many levels of comprehension in-between. As students learn incorrect concepts they develop their own fantasia. After all, they learned this information from a teacher, *the authority*, so it must be valid. However, it can be quite a shock when one finds out that firm beliefs are incorrect. Fantasia is also perpetuated by misspelled words on the chalkboard, or through incorrect grammar in prepared materials. *It is particularly insidious if one is to believe that we build new knowledge upon what we already know!* Technology has the capability to multiply fantasia as any Google search for topical information will confirm. What is sobering is the amount of energy it takes to correct misconceptions in learners' thinking and in our own belief systems. I remember once observing a student teacher modeling the Earth's rotation on it's axis and corresponding revolution around the

Sun. She explained that the Sun remained fixed in space while the Earth moved according to its own particular patterns. I asked her later if the sun was really unmoving and she soon realized that it would have been better not to say anything about the Sun's motion or lack thereof because she could have inadvertently created a false concept for some of the children. Sound familiar? An effective, albeit difficult strategy to counter fantasia is for us to be as accurate as possible in all of our writings and oral instruction and to require others do the same.

Nostalgia-The yearning for the past is quite strong. *Why do we have to learn version 3 when version 2 was so good? After all we spent time learning this already!* As upgrade begets upgrade we often feel as though we are on a merry-go-round of never-ending change. Basic program functions differ from one upgrade to the next and program elements placed in one position in one version are sometimes moved and hard to locate in the next version. However, for those who start learning a program with version 3, these are the good old days! Nostalgia is a hard roadblock to overcome because it is frequently based upon emotion and reverie and is often resistant to logic and/or factual evidence. One useful corrective is the purposeful linking of old facts and concepts with new ones, providing ample scaffolding for the assimilation of fresh information.

In addition to the impediments discussed above I utilize the term "propaganda" to identify an additional roadblock. *Propaganda* is the intentional misinformation that is disseminated-sometimes called "spin,"-which serves to obscure meaning and ultimately prevents an audience from moving towards a more objective perspective. Again, this is not a new phenomenon but within a technology context it provides interesting examples. I wonder what George Orwell would make of the INTERNET and the unfiltered, uncensored, unedited nature of the media? Here minds are not controlled by "Big Brother" but rather "Little Brother." Hundreds of millions of little brothers and sisters have equal access to the information superhighway which also offers a soapbox for any and all claims, no matter how sane or ludicrous they are. Propaganda is different from fantasia because its intent is to perpetuate and legitimize vested interests, half-truths, slanted perspectives and often outright lies, all clothed in the garb of objectivity. I believe that it is essential for learners to develop propaganda-detection skills and that lessons for uncovering misinformation should be included in any curriculum.

Busting through roadblocks

Admittedly, there are no sure-fire motivational roadblock-busters but I have found a few strategies that have been proven useful when encountering technology resistance in some learners. The following are points to ponder and pass along as part of an on-going effort to increase their enthusiasm for going digital.

1. The technology we are using in education is now at the consumer level. It is important to help adult learners to see they are already using products that are similar to the technologies they may be apprehensive about. Once they realize that an IT system is designed to foster their success (and gain market share) they often feel more comfortable as users. For example, I often require entry level students to buy cheaply priced digital cameras and then encourage them to take pictures at home. Later they use their photos in PowerPoint presentations. When students see how "easy" these devices are use, they often come around and develop better attitudes towards technology and often demonstrate their motivation to continue learning by creating presentations for their own use.

2. Consumer technologies are consumable. It is not hard to believe that our computers and other gadgets are moving towards maturity very quickly. If we can concentrate on the effective use of a technology instead of the size and speed of hardware itself, we will be better off. For all my classes, I make a point of going into the marketplace and getting inexpensive digital gadgets and using them for instruction. Two of my favorite eye-openers are budget digital cameras and inexpensive flash-drives with 128mb or more of storage capacity on a device the size of a thumb. Students soon avail themselves of these devices and many continue to use them in their professional practices. In addition, all students are required to put up their own websites overnight using Tripod and post their work online to elicit feedback from their classmates.

3. It's okay to get frustrated but don't get stuck! It is better to find ways to get unstuck than to gripe about something that goes wrong. Nothing kills motivation faster then getting stumped and not knowing which way to turn. I often repeat the phrase "Don't Get Stuck," then demonstrate ways to get going. For example, I show people how to use listservs and online newsgroups and ask the students to find answers to problems in this manner. If people can recognize they are stuck they can use any number of strategies to get back in motion. If not countered, inertia wins.

4. With technology there are usually many ways to do the same things so be flexible and learn more than one way to perform a procedure. This follows the previous point. For example, some adults are so unsure of themselves they don't want to learn more than one way to do a simple procedure on a wordprocessor. However, there are usually shortcuts or alternatives available for any computer task. I frequently spend time in class teaching two or three ways to manage the same process so that students will recognize that flexibility is usually built into the technology. Sometimes, amnesia sets in and people forget what they have learned so it is always better to have alternative or additional instructional materials available because teaching a failed lesson over again in the same way is a sure-fire motivation-killer.

5. Make mistakes. It is one thing to encourage students to make mistakes but then we must not penalize them for doing so. I always let learners rewrite and rework their assignments several times over. I emphasize that they not ask "Is this what you want?" requiring only a yes or no answer, but Instead I request that they ask for directed feedback, which always gets them a more useful response and circumvent the "yes/no" trap.

6. Share what you learn with others both in and out of class. It is important to encourage students who are making progress with technology to share their experiences with others, giving them both motivation and reinforcement for continuing their progress. This strategy helps to combat fantasia because people are usually more motivated to give correct information to their friends and relatives rather than spreading half-truths or conjecture which may later cause them embarrassment if exposed as inaccurate.

7. Time spent learning new things about software and hardware is an investment in yourself. So what if a technology quickly becomes second-hand? All digital multimedia systems are related to each other in some fashion. This interconnectedness evident in the evolution of wordprocessor applications over the past twenty years. Someone using WordPerfect in the early 1980s would have little trouble with the fundamentals of Word XP, even though XP has so many more features and reflects generations of progress in software development. Adult learners want reassurance that they are not wasting their time. Analogies such as this are useful reminders that they are always utilizing prior knowledge and experiences when learning new things.

8. Learn the logic of the hardware or software instead of trying to make it adapt your ways of doing things. There is no greater way to combat amnesia than to have students understand the logic of how a technology is supposed to work and how it really works. I use the first chapter of Norman's (1988) "The Psychopathology of Everyday Things," in my courses because it examines and exposes the inadequate design of many of the gadgets we use on a daily basis. I ask students to provide their own examples of poorly planned technology and this always draws many humorous responses, one more amusing than the next. For example, students will cite programming their television, VCR, cell phone or clock radio as an exercise in frustration and will often not utilize many of the useful features that are available with these products. We can all relate to the buttons that don't quite work as promised and the flashing LCD screen. Sooner or later students see that we almost always blame ourselves for these design flaws and this fantasia, techno-illiteracy, is easy to develop in adult learners. I emphasize to my classes that they should not think of themselves as stupid or technology-illiterate and that they can learn to use any of these products. Indeed, they are given assignments to help them overcome their anxieties and most report more success with IT when armed with this new point of view.

9. There really is no substitute for experience. Nostalgia makes us believe that it was easier to learn to use technology in the old days or with the old software. I counter this notion by asking people how long it took them to become good drivers. When they remember that it didn't take place overnight it makes it easier to argue for patience with their current technology-related tasks. If we don't make the effort, inertia will again trump our motivation.
10. Develop a tolerance for ambiguity. This is a corrective for all the roadblocks- amnesia, fantasia, inertia, nostalgia and propaganda. Technology can be frustrating and it is important to develop a tolerance for the unexpected when things do not go the way we anticipate. I find that pointing this out on different occasions, especially when I myself need it, provides a model for those wrestling with the same issues. Also, a sense of humor is a big plus for the inevitable twists, turns and tangles of technology.

A new perspective

One of my colleagues, Jesse Turner, likes to extend the analogy of the half-full glass for his teacher trainees. We can look at the glass as being either half-filled or half-empty. To paraphrase Jesse, if you look at the glass as being half-empty you are a poor teacher with little to offer. If you view it as half-full you are doing the best you can with what you have. However, the good teacher fills his or her own glass, one drop at a time. They seek to learn from all their experiences and do not allow themselves to get stuck but rather learn how make the best use of their resources and pass that confidence on to their own students.

Conclusion

While the advanced technologies of the past decade have evolved into today's mainstream products, many adult learners are still having difficulty using them, especially for lifelong learning tasks. In addition some educators have yet to take full advantage of the instructional potential of consumer-level digital media systems. This paper has identified several impediments for technologically-assisted instruction and offered a few correctives. It is hoped that the both learners and teachers will profit from the discussion.

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DEVELOPING AND USING MULTIMEDIA HYPERDOCUMENTS TO LEARN AND TEACH LANGUAGES - NEW TASKS FOR THE LEARNERS, NEW ROLES FOR THE TEACHERS

Guy Arquembourg

Abstract

The interest in technology in language teaching and learning is no new phenomenon but one cannot but note that the evolution of information and communication technologies has undeniably had a repercussion on research in the last few years. As far as Computer Assisted language Teaching and Learning are concerned, it is necessary to consider the role which can be played by authoring tools apart from enabling editors to design more or less elaborate learning environments. A new issue is to consider in which way these tools can be used by teachers to create their own pedagogical material but also by learners themselves to construct their knowledge of the language they are learning within a collaborative learning context. In the various experiments led by teachers, and studies carried out with groups of young learners or university students using a user-friendly authoring tool in order to create multimedia hyperdocuments, special emphasis has been put on the heuristic approach based on directing the learner's attention and making him/her reflect on the language, as a mean to raise language awareness. Particular attention has been given to the impact of pictures on language awareness and to the specific role which could be assigned to a hypertext generator for the learning of procedures in relation to the other materials available, whether didactic or authentic. The hyperdocuments presented, whether they have been designed by the teacher or by the learners, take part in a pedagogical process based on the solution of problems and the construction of knowledge. Such a learning process however raises the issues of the learners' autonomy and of the teacher's adaptability and these issues lead to a re-definition of the tasks of the learner and of the roles of the teacher.

Introduction

The interest in technology in language learning is no new phenomenon. Since the seduction of structural linguistics by sound recording, the history of Applied Linguistics, Language Pedagogy and Psychology of Education has been closely related to the evolution of technology. Whatever the technology involved, the integration and use of new tools within the institutional context is, however, conditioned by political, economic and technical discourse (Narcy, 1997) which usually precedes relevant theory in Language Acquisition Research and often ignores it.

As far as Computer Assisted Language Teaching and Learning are concerned, it is thus comforting to note the growing interest in authoring tools which not only enable researchers to design elaborate language learning environments but can also be used by teachers to create their own pedagogical material and by learners to construct their knowledge of the language they are studying.

Still more important is the renewal of the research in language acquisition which the *multimedia revolution* generated and more especially the revival of interest in learning theories which had never been quite applied within the institutional context. Thus, Papert (1993), the inventor of LOGO, building upon Piaget's *constructivism*, insists on the importance of real constructions as the basis of mental constructions, and, as Renié and Chanier (1995) note, a different type of learning based on *collaboration* or *cooperation* and *interaction* is now being considered as "an alternative to traditional ones" by "the community working on Computer Assisted Learning".

Applying these notions which date back to Deutsch (1949) or Vygotsky's and Piaget's work, to the use of an authoring programme, requires us to reflect on the various opportunities it offers, such as raising *language awareness* or facilitating a *heuristic approach*. It also implies taking into account the implications it may have on teaching/learning styles as well as on teacher/learner's autonomy.

It would be, of course, irrational to endeavour to go through such analysis within the time allowed for this presentation. So, the hyperdocuments shown in this Forum have to be considered "samples" of experimental proceedings in those grounds. They nevertheless aim at bringing answers to a certain number of questions concerning the appropriate type of software, the conditions of use of such tools and their utility for the learning of procedural knowledge.

The appropriate tool for the appropriate use

The observation of groups of teachers in various workshops dedicated to the use of authoring tools has shown that simple programmes are usually preferred to programmes

which, even if they did allow them to create more elaborate products, are not always easy to master. In this respect, when choice was given, the software in which programming was hidden, has had the favour of the vast majority of participants.

Thus the choice of *Polygraphe*[1] has proved sensible. This user-friendly software provides the designer with a blank page on which he/she can write, place pictures and create hyperwords and buttons which will in turn open new spaces, call up more text and pictures, play sounds or videos... The importance of this easiness factor is considerable since the programme could also be used most efficiently by learners, whatever their age, without adding any cognitive load to their task.

In a study carried out with groups of young learners[2], special attention had been given to the specificity of the role which could be assigned to this tool for the learning of procedures, in relation to the other pedagogical materials available whether didactic (textbooks) or authentic (foreign television programmes). Thus, most of the hyperdocuments presented, whether they had been designed by the teacher or by the learners, take part in a pedagogical process based on the solution of problems and the construction of knowledge.

In this respect it is essential to insist on the fundamental difference between video and television on the one hand and multimedia hyperdocuments on the other hand, even when the latter includes video sequences. As I remarked in a previous paper[3], the use of television and video implies collective viewing but involves individual participation (sensory, reflective, emotional...). It therefore requires tight control by teachers but allows learners to communicate with each other as well as with the teacher. If, conversely, absence of control is usually advocated in the use of hyperdocuments, common sense tells us that the efficiency of self-learning tasks is conditioned by a careful pedagogical mediation prior to the task. In other words, multimedia hyperdocuments, whether they are meant for the general public or for education, have to be considered as *didactic* materials and as such can't be handled in the same way as video *authentic* materials. The idea of the user's freedom and the principle of navigation based on association of ideas may in this respect be highly debatable.

It has been argued that hypersystems are more likely to suit learning contexts based on solving problems than those devoted to the acquisition of concepts (Depover, Quintin & De Lièvre, 1993). But, as Black *et* al. (1987) have pointed out, "the best adapted form depends on the nature of what has to be learned" and, Dufrene, Jolin and Senteni (1990) who have

1 A shareware version of *Polygraphe V* is available on Internet: http://home.nordnet.fr/~jmball
2 Learners aged 14-15 in their 5th year of English.
3 The following lines are extracted from a paper I read at the *Association for Language Awareness Third International Conference* (Dublin - July 4-6, 1996. (unpublished))

carried out a research on the use of "hypertext documents for the learning of procedures", have shown the limits of exploration environments in the context of procedures. It is essential to recall that these reflections concern the use of existing products. The creation of multimedia hypertext by groups of learners obviously involves other learning processes based on *constructivism* as well as on *cooperation.* So, as far as language teaching/learning is concerned, I would between differentiate *learning strategies* which apply to acquisition and rest upon motivation, and *perception/production* and *communication strategies* which concern the use of the language (Faerch & Kasper, 1984; Tarone, 1981).

Why should teachers create their own pedagogical materials?

The idea that it is rather absurd to advocate the learner's autonomy without considering that of the teacher is now starting to gain ground. More and more teachers also realise that efficient, easy-to-use tools can now help them to create the specific material they need, and are no longer satisfied with simply consuming products. Yet the question about using authoring tools remains *What for?*

I have previously insisted on the role which audio-visual authentic materials can play in the strategies mentioned above (Arquembourg, 1990, 1991, 1994) and on the importance of teacher's control in the learner's acquisition of both communication proficiency and ability to reflect on the language. Multimedia hypersystems now provide the learner with a double opportunity to explore the language (written/oral) while assisting him/her with visual data (pictures, video sequences) likely to facilitate the process of awareness. They allow the teacher/designer to *direct the learner's attention* in order to make him/her *notice* forms (Arquembourg, 1994, 1996; Skehan, 1996). They are thus based on a heuristic approach which encourages the learner to *reflect on the relation between meaning and form* (e.g.: my presentation of the forms used in French in a colloquial dialogue[4]) as well as on *the difference between the target language and his/her own language* (e.g.: my presentation of the use of the passive form in English as compared to French[5]). Moreover, as they introduce "the notion of context and of language learning as contextual shaping" (Kramsch, 1993), they are likely to bring an answer to the difficult question raised by the introduction of the communicative approach: *how can we work on the language without prejudicing communicative goals?* (Narcy, 1993) as well as to the now debated relevance of authentic materials to carry out grammatical tasks.

4 "Envoiture dans le tunnel", un exemple d'exploitation de document télévisé grand public (France-TV-Magazine n°37-Nov. 1994), (Arquembourg 1996)

5 "The Steadfast Tin Soldier", exploration of a video sequence from a television programme on Andersen's stories (Arquembourg 1994).

As far as vocabulary acquisition is concerned, multimedia hypertext provides the teacher with the most suitable means to encourage learners "to work on the unknown words they meet, before resorting to a glossary or dictionary" (Singleton, 1993): when creating a hypertext, the teacher can either provide the learners with definitions or lead them to infer by themselves the meaning of a word in its context. The possibility of providing different levels of help is, of course essential since it enables learners of various degrees of competency to achieve the tasks.

The last, but not the least, advantage of this tool is the opportunity given to the learner to open a note-pad in which he/she can, in turn, produce written language. As Renié and Chanier (1996) point out, "the main object of second language learning being precisely the ability to interact in that language, this production mode cannot be left aside during the process of acquisition.".

As shown in this presentation, the authoring tool has been used to create various types of documents ranging from a quick document to use in the language class to elaborate products designed for self-learning tasks without teacher's control. My main concern however has been to consider the role such programmes can play for language acquisition and the learning of procedures once they are used by the learners themselves.

Designing multimedia hypertext: a learning technique?

The most positive outcomes of the emergence of multimedia are undoubtedly the revival of interest it has caused, as I said, for didactic theories as well as the undeniable enthusiasm for a learning process based on the learner's autonomy. Renié and Chanier note that in the last few years, such notions as *cooperative* learning (Deutsch, 1949) or *collaboration* (Vygotsky, 1978; Slavin, 1983) and *interaction* have attracted the "community working on Computer Assisted Learning". They consider "interaction *with* a computer system" (or "companion-system") as a means to "make the learner reach a solution and not to make her (the learner) accept its (the computer's) solution". Relying on Vygotsky and Piaget's work, they insist on the "positive attributes of collaborative learning: learners are more aware of their errors, open to negotiation, motivated by a goal".

The first study which I had carried out with groups of young learners distinguishes itself from the reflections which precede, since the learners here had to use an authoring tool in order to produce a hyperdocument themselves and therefore benefit from having to build something together (O'Malley, 1992). They worked in pairs and in this way interacted with each other as well as "with the companion-system". It must also be added that they benefited from the support of the teacher when necessary. Yet, it is interesting to note that this study confirmed the positive attributes quoted above.

In the first stage of the study the learners had to complete documents prepared by the teacher and presented before the class. The tasks consisted in exploring a text or video document studied in class, to spot the key-sentences and key-words in order to build the structure of the document, working on the unknown words and producing definitions, matching text with visual data (provided by the teacher), recording oral comments or dialogues, etc.

Although at first the discovery of the tool involved a lot of playing with colours, graphic symbols, pictures, etc, the learners soon focused on a goal and applied themselves to the organization of text and the correction of errors, which involved negotiation and collaboration.

Once familiar with the process, the learners had acquired more autonomy and had started to work on their own projects, which required document research as well as writing. The activity had quickly turned into a writing workshop, with choices ranging from free-expression to text analysis with particular concern for the forms recently studied in class.

In this respect, the study had also revealed, as could be expected, the differences in learning styles or behaviours. Although the computer undeniably motivated a majority of learners, it soon became obvious that some would not easily benefit from this type of task. An alternative had to be offered to answer a need for tutorial work.

Building upon this study, a number of training programmes have been set up since then. The improvement in multimedia equipment and environments, as well as the growing interest in learning methods based on the use of authoring tools, have led to specific courses at universities, both in initial and continuing education. According to their curriculum, students are trained to use such tools to produce multimedia hyperdocuments. Thus, as shown in the samples presented, students who are preparing a master's degree in the pedagogy of French as a Foreign Language at the University of Lille 3, are led to create didactic multimedia hyperdocuments which are then made available in the Multimedia Language Centre of the university, to the foreign students learning French as well as to students in continuing education.

Conclusion

While technology is providing teachers and educators with new, efficient tools, research in Language Acquisition, Applied Linguistics, Cognitive Psychology and Computer Assisted Learning offers a new description of teaching and learning strategies based on *constructivism, collaboration* or *cooperation* and *interaction*.

Although it is still early to measure the impact of multimedia hypersystems on language acquisition, the opportunity they offer to raise the learner's awareness and to give him/

her an active role in the learning process has already attracted a number of researchers and teachers who consider the use of hyperdocuments as a means to reconcile *meaning oriented* and *form-based* learning.

The presentation of 'home-made' multimedia hypertexts has a double aim. Firstly, it has to be considered as an account of investigations carried out in the field of computer-assisted teaching and learning to know in what ways an authoring tool can be used and to what extent it can facilitate teaching and learning. The various needs (of the teachers and learners) have been examined in order to determine the role such a programme can play in presential teaching situations as well as in self-learning or semi-directed learning tasks. Special emphasis has been placed on the use of a hypertext generator by the learners within a collaborative learning context. Secondly, if we consider that creating appropriate tasks based on authentic material remains an essential part of the teacher's role, it is a way to show that multimedia technology can be used to serve other pedagogical purposes complementary to the use of specific environments.

This research is based on the conviction that both teacher and students need to be the partners of a creative enterprise and to work in collaboration. This implies redefining the roles of both the learner and the teacher, who must in turn act as a mediator, a tutor and a language advisor.

It would not be honest, of course, to suggest that a teacher only has to be creative to be efficient. Whatever the technology used, designing tasks needs training. However simple, the use of POLYGRAPHE may be, designing hypertext also needs training. One can only wish for this form of *technological culture* to be introduced into the teacher's curriculum.

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COMPUTER LITERACY PROGRAMME FOR OLDER ADULTS

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Abstract

Determination of programmes, selection of content, methods and forms of training, characteristics and particularities of adults and of adult education, have to be taken into account when planning adult education. In the ROP project, Computer literacy for adults, concept and programme for computer literacy for older adults are being developed. During the concept preparation, needs and activities generated by the use of information technology in everyday life were taken into account. Besides using the computer for communication with different institutions and organizations, not just with the state, there are a number of procedures and activities that have some elements of electronic communication and use of which often causes problems for individuals. The programme was developed following different steps: analysis of conditions and potential participants, analysis of needs for education and training, development of educational programme's goals, definition of content and curriculum, and planning of programme implementation. During the development phase, up-to-date literature and results of new developments in the field of education and training of adults were taken into account, as well as particularities for education of older adults, in particular results of research into learning of adults and older adults. The programme will take into account the needs, characteristics and educational particularities of individual learners. An important part of the project is also public relations. Analysis of different forms of access gives us the ways and means to inform and attract groups from different social levels, and to motivate them for training in this particular field. Information activities will be carried out with a broadly planned action. The paper presents our approach in preparation and conceptualization of the curriculum, content of the programme and some of the issues of the implementation of the programme.

Problem definition

The Republic of Slovenia has decided to introduce and speed-up electronic operations and communication with its population. Beside the state, other businesses are also rapidly moving to the area of electronic operations, showing that ICT will become a part of everyday life in the near future. Not knowing or not being able to use the ICT will affect the quality of life. One example of this is the banks that allow and stimulate individuals to move into electronic business with them using the Internet and web software.

Analysis of the use of Internet/computers shows that most of those who are using information and communication technology (ICT) are younger or early middle age. There is a broad segment of the population, especially those with lower education and lower incomes, as well as older adults who are not using it for different reasons. Among other reasons there is non-familiarity with computers, fear, difficulties in accessing computers, to name just some of them.

Brain mechanisms in the adult population, the nature of the ageing brain and the challenge of learning in ageing are also specifics that need to be taken into consideration. Research into the learning needs of normally ageing adults shows that there is a general decline in most cognitive capacities with age and that a range of disorders associated with ageing appears, but there are also strategies for arresting decline and enhancing capacity in those affected.

Project goals

The aim of the project is enhance computer literacy of population, which would allow individuals to become familiar with ICT, to become familiar with and to use the basic functions that allow them to communicate with the state or other organizations, making it simple, not burdening them with issues that are not important for using ICT.

The target population compromises those older than 50 years. In Slovenia there are around 440,000 people in the age range between 50 and 70 years. Research results from a survey in the year 2000 show a very low level of use of the Internet and, as a result, use of all information and communication technology. This is a population that is active in economic and social life and use of ICT is very important for professional success, both for those who use it in their employment as well as those who are unemployed and would like to find a job. Beside them, we are addressing also older adults, those retired and some other groups, for example housewives and those who are home. For them, goals are different, among others to be operational in everyday life, to be independent, to communicate and to be informed.

The aim of the project was to analyze adult education for the use of ICT in developed countries and to prepare a curriculum for training the target population, to pilot the cur-

riculum to get feedback, preparation of learning and teaching materials, and preparation of a plan for training and communication with the target population in order to involve as many as possible.

The specifications of adult education

The concept of lifelong learning sets adult education into a new position. The emphasis of the education is no longer just on the youth. Education is a permanent process that flows continuously throughout all life stages of an individual and does not end when the organized education is finished. The longer life expectancy and very rapid social development are also responsible for our encountering many changes and novelties on the daily basis, in private life as well as in professional life. That is why adult education is an indispensable part of the whole educational system. Its role is changing towards continuous access to knowledge and skills for the new needs.

In order to provide quality adult education we have to take into consideration its specific features. An adult is an individual and independent human being who has his/her own desires and perception of life. The methods that we use for the education of young people are therefore not appropriate for adults. Adults can be turned off, if they are put in a subordinate position. Their self-images can also be too critical and ungrounded, which could represent an obstacle for successful learning. Also adult people learn differently from the younger. Therefore, we have to pay attention when choosing appropriate teaching and learning methods, which take into account all the characteristics of an adult. Furthermore it is important to create an appropriate physical and especially social environment. The teacher can also contribute to the environment, because he/she is no longer only a source of knowledge and information, he/she leads, animates and advises adult participants on how to use their capabilities to their best advantage. Besides that, teachers should pay special attention, especially in older adults, to their possible health problems, for example problems with vision, hearing, health status and psycho-motoric capabilities, which could have an effect on their learning processes.

Motivation is the next important factor in adult learning, which needs to be considered when developing a learning program. The adults learn differently, they join the programs because they want to achieve certain goals and make use of the knowledge obtained. The adults have also different life experiences and social roles, which can stimulate or obstruct their motivation. An important factor for successful learning is furthermore previous experience and knowledge, life style, approach to learning and learning habits. Consideration of these factors means acknowledging the abundance of adult life experiences. It is therefore important to create a learning environment that acknowledges and supports all forms

of learning and at the same time takes into account the fact that the adults decide on further education because they strive to be more successful. The usefulness of the knowledge they obtain is therefore important for them, since their readiness to learn originates from existing requirements, whether they are of personal or professional nature.

We also have to take into consideration that it is not enough just to offer education or training. Older adults need specific learning programs which are developed in cooperation with them. It's a fact that older adults are often seen as dependent on the environment, that they are lacking in initiative and determination, which could lead to a situation where programs are designed in a patronizing way and are not offering participants enough possibilities to shape their own priorities and decisions. Therefore is important to understand and take into account the characteristics of older adults, which have a big influence on their self-image and on what and how they want to learn. For older adults personal comfort, safety, a feeling of meaning in life and independence, are important. In accordance with this, the goals of education should motivate autonomy and personal growth as well.

Analysis of circumstances and potential participants

Adult education planning is different from the education of young people, as the goals are different. Education of adults is linked to the actual needs of life, so in planning of the program we have to know beforehand and take into account the influences and environmental factors. We have started from the aims of the program, needs and activities generated by use of information and communication technology in everyday life.

The second important step is analysis of potential participants. We will define, and at the same time limit, the target group of participants and define their characteristics in order to be able to plan other components of the education programme. When the target group is selected, the educational needs can be defined.

Defining needs and demand for education

Every individual has a developed set of values, broader aims that he or she tries to reach and fulfill. Values are the most important motives, which permanently direct individuals and their activities. Beside values, viewpoints, interests and habits are important for the motivation of an individual. For an individual, the main goal of learning is to be successful in reaching goals that are important for him or her. The educational needs required for this are skills and knowledge.

There are some specific skills that have to be addressed in the programme. Older adults are in most cases less flexible and their flexibility has to be developed. They have to adapt to

changing situations, as for example what to do if the page that pops-up is different from the one he or she is used to. They have to start to think about how to find a solution, how to react in an unknown situation. They also have to develop basic skills to use the ICT equipment.

The analysis gives a picture of the present situation and leads to identification of different needs of individuals, organizations and the community. In doing this we take into account what we want to achieve with the programme and what procedures and methods will be used. Identified needs will help us to define specific goals that will be achieved with the programme.

Developing goals of the educational programme

The programme will be designed according to the characteristics of the target group. Goals will be defined very explicitly, so that both organizers as well as potential participants will know what the outcome of the programme is and what the expected outputs are. Feasibility in the existing conditions and individual interest of participants will also be considered. It has to be taken into account that, with aging, values and interests do not suddenly change, so development of the programme must not be based of stereotypes on older adults. Nevertheless, we'll take into account that specific psycho-motoric and mental-cognitive characteristics, as well as the health status of the older adult population, do exist and have to be considered in developing of the educational programme.

Needs will be ordered into categories and priorities. Both educational and operational needs will be taken into account. These will be narrowed using filters, for example: individual interests, feasibility, and repetition of the programme. The remaining needs will be set as goals of the programme. Programme aims will contain the expected results of education and so serve for preparing the educational plan. On the other hand they will also serve for quality assurance of the execution, so they have to be measurable to allow evaluation of the programme.

Defining content and curriculum

On the basis of the goals the content will be chosen. Content has been selected on the basis of the actual needs and goals of the programme, and on the basis of previous experiences of participants. As adult education is functional and follows actual problems and the logics and characteristics of learning of adults, the content will follow this as well.

Units will then be linked to form a programme. Organization and designing of the content that will be placed in the programme will depend on time available for education, as well as on the previous knowledge, experience and expectation of participants.

Formation and organization of education

The project was launched and some of activities have already been carried out. The teaching plan has been prepared and is being operationalised, educational aims and goals have also been defined and content selected. Teaching methods and forms are being developed, and learning materials prepared. Teachers will be selected and trained. At this very moment a pre-pilot is being carried out, to test some of the concepts and methodologies.

There are a number of activities that still have to be carried out, as, for example: an overview of possibilities for education, survey of organizations and other institutions that can offer education and training, timetable for education and financial plan. Administrative, organizational and technical preparation of the educational process, provision of adequate premises, and well executed enrollment of participants are issues that are being addressed. Important issues are also promotion and public relation activities for the programme. Information technology literacy of adults, not only use of computers but also other modern communication equipment and services, which plays a more and more important role in everyday life, is becoming very important. That is why we have decided that in organizing and carrying out of the ICT training for older adults we'll try to find partners and sponsors.

Planning public relation activities: »The brain grows by use«

The goal of the project proposal was the mass training of adult and older adults for electronic communication.

However, to reach this goal, we believe that a special public oriented »marketing« approach should be used (for example slogans as one in the title). Specific public relation activities and materials will be designed and used to increase the awareness among target groups that information technology will be an integration part in the everyday life of the near future, in order to raise their interest in information technology training.

The plan includes the identification of audiences, definition of their attitudes and opinions, the analysis of different approaches to them, and the preparation of the plan for public relations activities. Together with this we will also prepare the strategic plan for dissemination, provide trainer training for a specific andragogical approach for older adults and training for quality.

Conclusion

For older adults, the use of information and communication technology is becoming more and more important. This is an additional, important link to the real, everyday world that gives them the opportunity to be in touch with others. The program for training has been

developed and is being implemented with a heterogeneous group of older adults. First experiences and comments show that such training is badly needed and most appreciated by participants. Those having some previous experience and "freshmen" equally find it challenging, useful and are excited, waiting for the next classes, wanting to bring their friends too. And this speaks for itself.

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Appendix

Programme contents

The programme covers the following areas:

a. Use of computers:

The aim is to train participants in basic use of personal computers, mainly for the use of the Internet.

a. Computers and computer periphery

Participants learn about the basic components of the computer in order to be able to turn it on and use it:

i. Computer
ii. Printer
iii. Modem

b. Linking computer to Internet

Participants will learn how to use that software that allows access to the Internet and to the server of internet providers. It's assumed that setting-up of access numbers, modems etc is done by somebody else. The aims are the daily use of these programmes. Themes are:

i. Obtaining usernames by providers
ii. Calling internet provider

c. Use of e-mail programmes

Participants learn about basic principles of how e-mail works and will learn how to use it. The goal of this module is to make them enthusiastic and trained for the basic use of e-mail, especially for:

i. preparing and sending e-mails
ii. opening and saving e-mails
iii. using archives of received and saved e-mails
iv. managing archives of messages
v. forwarding received messages

d. Surfing on the Internet

The Internet has become the biggest global source of information. Participants will learn about the most important possibilities for using this system.

i. Use of programmes for Internet access

The basis is an understanding of the protocol http or service of World Wide Web. Participants will learn about basics of http and use of software for Internet surfing. Themes are:

1. Starting of programs for Internet access
2. Basic logics of http
3. Navigation on Internet pages, use of links hyper link
4. Use of commands – buttons for navigation in the programme

ii. Presentation of search pages on the Internet

Search pages and portals are important for finding information we are looking for on the Internet. Participants will learn about Slovenian search pages, but if they speak and can use English or another foreign language some other pages will also be presented. We'll focus on the following:

1. mat'Kurja
2. najdi.si
3. Google
4. Yahoo

iii. Presentation of important Slovenian web pages

Participants will learn about some of Slovenian web pages and will also receive their addresses. Those are:

1. phone directory – TIS
2. web newspapers and journals:
   a. newspapers
   b. journals and other periodical publications
   c. regional publications
   d. thematic publications depending on the group wishes and interests
3. www.24ur.com
4. web pages of tourist organizations and agencies
5. web pages of ZPIZ
6. web pages of ZZZS
7. portal e-government
8. banks

e. Use of web services

This part of the programme will show practical examples of services on the Internet. We have focused on those and don't need communication with employees of organizations that offer those services and also give time savings. These are:

i. Electronic banking
ii. Getting certificates for health insurance when travelling abroad.
iii. Services of e-government
iv. Buying on Internet (products, air tickets, tourist arrangements etc.)
v. Filling phone accounts for mobile phones

b. Use of modern information services:

The second major part is use of other modern telecommunication devices. These are mainly mobile phones and equipment for public services. Their usage is in principle very simple. These training instructions are meant mainly for those participants that are not using them.

Computer equipment is not necessary for this part.

a. Automatic telling machine (ATM)

ATM is a simple machine to use and allows quick and good quality use of bank services. The following services will be presented:

i. money withdrawal
ii. checking bank account status
iii. paying money orders using ATM
iv. money deposit
v. buying credit for mobile phone

b. Mobile phone

The mobile phone is being used extensively in recent years. This trend is not so pronounced in the older generation. The aim of the programme is to encourage participants to use mobile phones and presents the possibilities for use. Phones are different, and it's difficult to give training in their use, so this part is motivating. Some possibilities will be presented:

i. receiving calls
ii. calling
iii. saving numbers in directory
iv. sending SMS
v. receiving SMS

c. **Health insurance information device**

This is a device provided for renewing information about health insurance, installed in hospitals and ambulates. The programme will present the different possibilities that this device offers besides renewing data.

c. **Advance use of computers:**

This part of the programme is for participants who may want additional knowledge and skills in using computers. We have planned the following two areas:

a. **Text editor**

b. **Preparation of presentation on the web page**

LIFELONG LEARNING, IS IT A MODEL OF PRODUCTION OR CONSUMPTION?

Jane Simmons

Abstract

The focus of this paper is on the perspectives of those, both employers and employees, who are engaged in lifelong learning, within the UK economy. It puts forward two views of lifelong learning. One being that it can be regarded as a process of production, on the part of employers, providing skilled workers whose skills and knowledge are consumed by the economy. The other view being that it may be regarded as a model of consumption where the employees, or consumers, take responsibility for their own learning either in relation to their own employability or even as a leisure activity.

These arguments are supported by Smith and Spurling (1999) who suggested that, whilst learning is a process carried out by individuals and groups, what is important are the outputs of that learning. The writer suggests that this is a model of production, whilst Field (1994) referred to the education of adults in relation to consumption. In this model the employees, or consumers, make explicit choices as to their own learning with a view to continued, or enhanced, employment. This, the writer suggests, is a model of consumption.

Introduction

Much has been written about lifelong learning, which involves both individuals and organisations. It has, arguably, the widest possible boundaries and includes all the main types and classes of learning, academic and informal. Both formal and informal education and self-directed learning are covered by the terminology. The intention to learn and planning for it on the part of the individual, or organisation, may be seen as an ongoing intent to learn. This is usually expressed through some form of personal, or organisational, plan or strategy for ongoing learning, which is maintained and acted upon over time.

This paper will put forward two arguments in relation to lifelong learning. Firstly, that it is a model of production, on the part of employers, providing skilled workers whose skills and knowledge are consumed by the economy. Secondly that it may be viewed as a model of consumption where the employees, or consumers, make explicit choices as to their own learning with a view to remaining employed or indeed for their own pleasure.

What is lifelong learning?

Smith and Spurling (1999) provided a simple definition of lifelong learning, that it relates to people learning consistently throughout their lifespan, covering all life from the cradle to the grave, and may start at any age.

Lifelong learning takes place within a context, be that organisational, national or global. Indeed Longworth and Davies (1996) put forward four value systems in relation to lifelong learning, viewing it as a form of economic investment. These are, firstly, that organisational learning as an investment in survival, here the model is one of production, creating and sustaining learning in order that people are empowered to cope with the changing external environment.

The second is national, here learning is viewed as a national investment; this agenda centres on the creation of national programmes for enabling and stimulating lifelong learning. The predominant discourse being that of government agendas, such as think tanks. Their third value system is societal with learning as an investment in wisdom and social harmony. The agenda here is one of creating and sustaining learning societies both in communities and globally. Their final categorisation is that of the individual, or consumer, here learning is regarded as a personal investment in the future encouraging personal growth and developing potential, possibly to ensure continued employment, a model of consumption.

The macro environment within which lifelong learning takes place

In an era before the concept of lifelong learning was devised, the 1944 Education Act - in England and Wales - took three distinct views of learning. In it education was conceived as

providing for the general development of individuals and was the specific responsibility of the state, which reflects the model of production. Training was viewed as providing people with specifically employment-related skills and was the responsibility of employers, which reflects the notion of production. Leisure related education was regarded as providing people, who were better identified as consumers, with recreational pursuits, which were self funded, and is clearly a model of consumption.

In the decades since the end of the Second World War the strength of the UK economy has continued to fluctuate, as global economic and social structures have changed. As Edwards (2001, p.6) held, the focus on lifelong learning by governments "is reflected in the alignment of lifelong learning with changes in the economy and workplace, the need to invest in human capital to ensure economic competitiveness in conditions of increasingly globalised capitalism." Consequently, the structures of employment have changed and lifelong learning opportunities have been under pressure to have relevance to the needs of industry to ensure economic competitiveness.

For example, Machin (1996) used census records to discuss how there has been a move from manual employment to more skilled jobs in the workforce. In 1948, 16% of the workforce was in non-manual employment, by 1990 this had reached 33%. He held that the bulk of the increase, approximately three quarters, is due to an increase in the use of middle/senior managers and senior technical or professional staff. As a consequence of this change in employment patterns has led "in all western countries manual and 'unskilled' workers suffering much greater unemployment those in professional and non manual occupations." (Apple, 1996, p.80)

Contemporaneously there has been a de-layering of management structures in UK industry together with the end of jobs for life. The causes of these have included changes in the economy, increased global competition, technological change and demographic trends, all of which demand flexible and multi-skilled workers. In turn, this flexibility is viewed by employers as promoting competitiveness, economic growth and guaranteeing employment. However, as has already been indicated, workers can no longer rely on stable employment in one organisation or area of work for their lifetime. Accordingly, employees have to be prepared to move, change and develop as employment opportunities change. As Edwards (1997, p.16) noted people now have "to make their own way without fixed referents and tradition anchoring points in a world characterised by rapid and unpredictable change, uncertainty and ambivalence, where knowledge is not only constantly changing but is becoming more rapidly and overwhelmingly available."

These changes have led to the emergence of high performance organisations with flatter hierarchies which emphasise team and which require high levels of skills and creativity in

the workforce. This in turn has generated a demand for continuous updating by employees to respond to the higher skills, which the workforce is now required to have. As Smith and Spurling (2001, p.104) held, "in the current economy short-term shareholder value dominates corporate strategy, reclassifying any sentimental attachment to the specific labour force... as a luxury." Therefore, in some organisations, employees are now viewed as little more than current assets to be used, or disposed of, as economic circumstances dictate.

In order to ensure quality of training and development in organisations, the UK government introduced the Investors in People in 1990 as a national standard, or benchmark. As Edwards (1997, p.113) stated "government promoted initiatives, such as (this), encourage employers to take a systematic approach to the development of their employees." Whilst Reynolds and Ablett (1998, p.24) held that government initiatives, including Investors in People, have "proved attractive to organisations and in many instances are perceived as a route to becoming a learning organisation, or indeed to becoming (in some instances) synonymous with the learning organisation."

However they held (1998, p.27) that it was launched "against a background of growing concern about potential skills shortage and the need for better vocational education and training to improve business performance." In their survey of sixty organisations they found that the most frequently anticipated organisational benefits included improved motivation, 95%, improved employee awareness of business objectives, 95%, and a closer link between training and business goals, 80%. Keep and Mayhew (1996, p.319) held that "one of the few admissions that the internal workings of the firm have to be addressed if training policy is to succeed, comes in the Investors in People initiative." Eastgate (2000, p.161) took a much wider, global, view and suggested, in relation to Investors in People, that 'world class businesses result from the quality of people working within them to achieve excellence.'

Employer perspectives

In the light of all of these changes in employment it may be argued that organisational learning is where learning takes place that leads to changes in the behaviour of individuals or groups within the organisation, and thereby encourage them to contribute to the overall performance of the organisation. Longworth and Davies (1996, p.64) took an instrumental view of organisationally promoted learning when they suggested that "for the individual, learning is employability and employability is learning. For the organisation, learning is survival and survival is learning. For both, lifelong learning is lifelong earning. Further, it is a matter of social success or disaster and of survival." This is supported by Smith and Spurling (2001, p.1) who held that the "motivation to learn is an urgent issue politically,

economically and socially." Here the model of lifelong learning is solely one of production. Phillips (1991) put forward a number of areas where organisations might expect to find positive results following on from employees being involved in learning, and/or development experiences. All of these areas are capable of being measured using quantitative information. These measures include cost savings, which can be evaluated in terms of increased production, in terms of volume or costs, reduction in costs or overheads. Timesavings, which can be broadly measured using the same criteria, and by looking at the time required to respond to orders together with overtime costs. Work habits, which can be measured by volumes of production and output, number of new accounts obtained, absenteeism and rule violations. New skills, which could be identified by improved quality of work, fewer defects and, or, accidents. Improved working climate, which would be evidenced by low, or reduced, turnover, staff commitment and satisfaction. Finally, initiative, which could be measured by the generation of new ideas and accomplishments by employees.

Waterman et al (1994) summarised this approach, holding that "employers give individuals the opportunity to develop greatly enhanced employability in exchange for better productivity and some degree of commitment to company purpose and community for as long as the employee works there." They also discussed the concept of a career resilient workforce which they define as employees who are not only dedicated to the idea of continuous learning but who are also ready to reinvent themselves to keep pace with change. These people are prepared to take responsibility for their own career development and are committed to the company's success.

All of the changes in working life and the employment patterns associated with flexibility have led to insecurity among employees, concerned about their future employability. However, Edwards (1997, p. 34) held that "within the flexible firm, core workers can expect opportunities to become multi-skilled, increasing their skills both vertically within the sector and horizontally as they learn to do jobs previously the responsibility of others." Indeed, Browell (2000) suggested that maintaining competitive advantage, through quality initiatives, has been seen as being vital to organisational survival, and therefore jobs. It was her view that learning and development, including lifelong learning and continuing professional development (CPD) for employees, has been viewed as a strategic tool because of the potential to increase quality and performance.

Employee perspectives

Maund (2001) held that employees have a number of motivations for learning. These encompass both the model of production and that of consumption, and include intrinsic

pressure, external pressure, the quality of provision available to them, specific drives and personality factors. Students' intrinsic motivation, or consumption of lifelong learning opportunities, is relevant to the course to their future career and their own personal interests. Whilst extrinsically they are motivated to study, they may also be concerned with the value of the underlying qualification, and that it will be recognised by their current, or future, employers.

However, Smith and Spurling (1999, p.13) suggested that "learning can be treated as an activity which has benefits and costs only for the learner - whether as a private and individual investment, or as an act of consumption." They went on to suggest that this view ignores external benefits, for example, one person's learning may serve to motivate others, or be of benefit to others. Whilst Fallows and Ahmet (1999, p.2) put forward the idea that "students' motivation to learn is determined by a range of factors". The most relevant here being that their academic and career aspirations are important, as are the rewards, which are expected to accrue from their learning.

The subject, of certification as opposed to the actual paper qualification, itself has a low priority. Indeed Fallows and Ahmet (1999, p.4) held, in relation to undergraduate study, "the certificated qualification has been seen by many students as the easy passport to well-paid employment". Macfarlane and Ottewill (2001, p.16) took the view that the one thing which employees have in common is that "whatever their level or background, is that their prime motivation in studying is very probably economic." Their underlying motivation therefore being to improve their career advancement or to improve their performance in their current role. Whilst Smith and Spurling (2001, p.1) held that "the levels of motivation displayed by individuals reflect their social and economic experience in general, and their family experiences in particular." Despite these experiences, they concluded that everyone can be motivated to learn and that society in general can take steps to improve this motivation to learn and thereby contribute to the national wealth.

Illeris (1997) identified a number of qualification requirements, or competencies, which are essential for learning to occur. These include motivational factors such as drive, dynamism, keenness to learn, the persons' capacity to keep up with and contribute to their own development. It may therefore be argued that students' intrinsic motivation is relevant to the course to their future career. Their underlying motivation being to improve their career advancement of their performance in their current role. So learning is relevant to the course of their future career, and to other factors, which are personal to each individual learner. Whilst extrinsically they are motivated to study they are also concerned with the value of the underlying qualification, and that it will be recognised by their current, or future, employers.

Consumption versus production

Rogers (1996, p.11) divided adult learning into three categories, which reflect the discourses of production and consumption in addition to that of the learners themselves. Firstly, their occupation requires them to pursue learning. Factors which are relevant are: changes in the nature of their job, workplace and the potential of being, or remaining, employed. There are echoes here of the discourses of employers. Secondly, in line with the discourse of government policy makers, through life people take on new roles in society and these are redefined throughout life and require new learning, for example in relation to coping with adult life, becoming a parent and so forth. This is arguably a model of consumption, arguably with undertones of production. Finally, as adults grow older their interests and attitudes change, this is the discourse of the learner, or consumer.

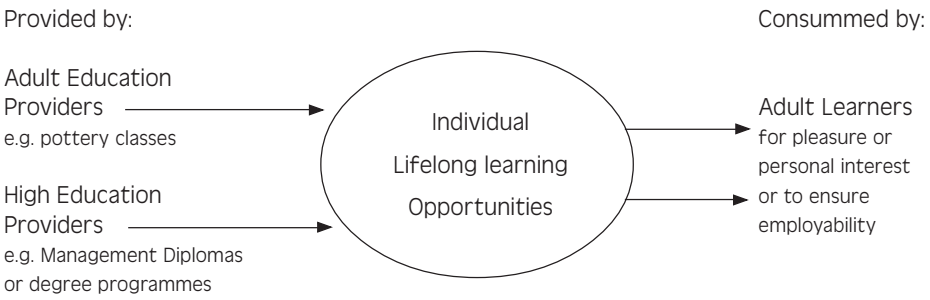
Field (1994, p.140) actually referred to the education of adults in relation to consumption, and in essence to economic theory. He identified four dimensions. One of which is that people are now more affluent than they were in the past. Therefore, adults, in the workforce and outside of it, have the ability to select their own learning opportunities; they have access to greater choices. In the light of these changes educational activities can be viewed, or understood, as consumer goods in themselves. They are optional services, which are purchased as the result of consumer choice in the same manner as a car or washing machine.

He also put forward the view that education can be understood as part of a consumer culture, that education can be considered in the same light as personal pensions and private health services, 'culturally, too, the education and training of adults display many of the characteristics of consumerism.' Two examples appear to support this viewpoint; one is the growth of educational provision in the UK, which includes access to qualifications together with consumer insistence not merely on the quality of delivery within educational settings but also on peripheral areas such as the availability of refreshments in those institutions.

Whilst Edwards (1997, p.48) broadly agrees with Field's first three categories he also added two additional ones. Firstly, he held that contemporary culture is marked by 'individualisation and this is also a characteristic of trends in lifelong learning.' Secondly, that learning is an enjoyable experience, but 'learning opportunities have to compete for the consumer's income and their scarce leisure time, even as consumption is accorded increasing cultural significance.'

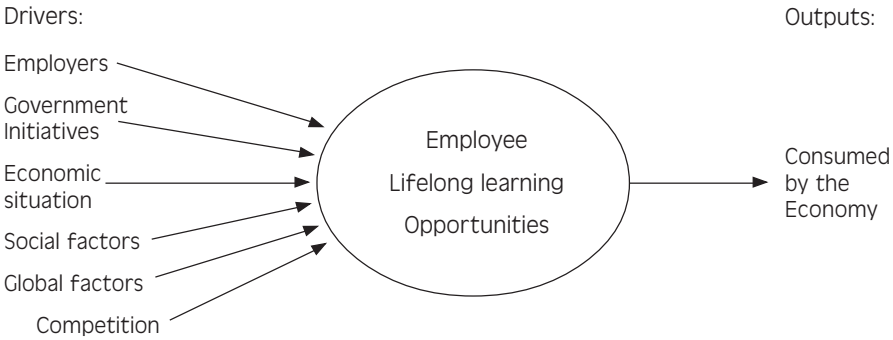
All of these discourses are reflected in the following figures. **Figure 1** illustrates the model of consumption where a variety of external providers, ranging from Adult Education to Universities, compete for the consumer's, adult learner's, business by way of attendance on their courses.

Figure 1: Lifelong learning as consumption



Whilst **Figure 2** illustrates those forces which lead to the provision of lifelong learning opportunities to employees within a work context. These are accessed by people in the workplace and are ultimately consumed by the economy by way of their improved performance and/or improved productivity.

Figure 2: Lifelong learning as production



Conclusion

Senge (1990, p. 139) held that 'organisations learn only through individuals who learn.' Individual learning does not guarantee organisational learning, but without the former, the latter cannot occur. Therefore, it may be argued that the only source of competitive advantage is a business's ability to learn and to react more quickly than its competitors. As Storey and Worrall (1996) found, in their research of one thousand West Midlands CEOs, two factors were important in improving the competitiveness of that region. Firstly improving managerial skills in the region's business and secondly improving the training and education of the workforce. This is a model of production where learning is consumed within the economy. Indeed Boshier (1998, p. 8) held that 'lifelong learning is a key instrument to foster economic development,' that is, it is consumed by the economy.

Collin (2001, p. 278) suggested that 'lifelong learning means continuous adaptation.' Increased knowledge and improved skills enlarge the employees' capacities to adapt to the environment and therefore to change it. In this way, their learning is consumed within the economy. There is a clear dichotomy here since if employees are able to enhance their ability to influence change they can also oppose employers' proposals for change.

The discourse of the learner, the consumer, is clearly significant. As Hicks (2002, p. 350) noted 'learning means a change, but a change of relatively permanent kind.' In her view, learning implies a different internal state, which results in new behaviours or actions or new understanding and knowledge on the part of the individual, enabling them to survive in a turbulent environment. This is a model of consumption and is supported by Longworth and Davies (1996, p.22), who held that 'lifelong learning is the development of human potential through a continuously supportive process which stimulates and empowers individuals to acquire all the knowledge, values, skills and understanding they will require throughout their lifetimes and to supply them with confidence, creativity and enjoyment in all roles, circumstances and environments.'

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THE MOTIVATION FOR IN-SERVICE TEACHER EDUCATION (EVALUATIVE ANALYSIS)

Slavica Černoša

Abstract

Constant professional further education, education and training of specialist workers in upbringing and education is necessary due to quick development in the professional as well as the pedagogical and andragogical fields. Not only individual parts of the social system are changing, the system is changing as a whole, so this calls for a lot of strength, willpower and knowledge to transform and accept news brought by such change.

So the basic education is absolutely not sufficient for the whole working time but needs to be constantly renewed and supplemented the whole life long, especially in upbringing and education which are particularly sensitive to all kinds of change and at the same time are of vital importance for the development of every society.

In spite of the fact that further education is a right and a moral duty for every teacher and participation must be optional and not compulsory, it was the system of promotion linked to the system of constant professional further education that brought positive movement towards a higher demand for professional further and additional education. This means that consequently also the offer of different programs for professional further education, the methods and designs as well as the number of organisers had to rise, which in turn enhanced competitiveness and indirectly influenced the quality of all forms of education including basic education. In this way the purpose of this system is partly accomplished. For a higher motivation of the teachers to participate in further education and a positive effect of this further education in the classrooms, their participation should be optional. But the reality bites – attention is higher where it is in some way prescribed or tied to the system of promotion, also being a constraint of some kind.

In-service teacher education as part of the promotion system

Promotion of teachers has advanced greatly and influenced the development of professional further education that has developed – and still is developing – with new fields and programmes of professional further education and improvement. At the same time it has stimulated teachers and other professional workers in education and upbringing to constantly educate and perfect their knowledge.

In-service teacher education in Slovenia of all professional workers in upbringing and education had received much attention already in the past, however a real prime was brought by the new legislation in 1991, when in-service teacher education became a constituent part of the promotion system of professional workers in upbringing and education into titles.

This promotion system caused a big shift in the field of in-service teacher education, as it triggered the development of the in-service teacher education and enriched it with numerous new themes and above all new work forms and methods and at the same time it encouraged teachers and other professional workers in upbringing and education to take part in seminars of further education.

After that year the selection of seminars in this field has been enlarging from year to year. Such a broad offer of seminars caused an independent publication of the seminars, so in the academic year 1994/95 the offered and ordered in-service seminars were needed to be published independently. From this year on the seminars are published in a catalog, issued yearly by the Ministry of Education, Science and Sport and the National Institute of Education. This means that the seminars were selected and evaluated with points and in this way demonstrated in the promotion system for pedagogical and other professional workers in upbringing and education.

The evaluation system and the selection of in-service teacher education seminars is precisely defined as well as the competence of the individual parts in a long chain, where professionalism of the members who evaluate and select seminars is a special issue, so that they are not personally interested in the execution of a specific seminar, that the selection measures are followed into detail, that in the assessment committees all levels of education are represented – the preschool level, primary school, high-school level and also university level and that the seminars are being chosen unanimously – whereas outvoting is the most extreme measure. Additionally it needs to be especially stressed that the in-service education seminars are chosen on the basis of a public tender, where there are four basic conditions: that the seminars performing organization is registered for educa-

tion, that it has adequate premises and technical means, lecturers with appropriate professional references and references from the field it is entering into the tender. The entering conditions are strict yet broad enough to allow to qualify for the in-service teacher education system to all organizations which meet these conditions, and not only to educational institutions. Not only the faculties and other educational institutions but also numerous other organisations (schools, kinder-gardens, student hostels, unions and societies, institutes and education centers and private organizations) organize in-service training seminars. They contend under equal conditions in a public tender being called yearly by the Ministry of Education, Science and Sports. Based on the evaluation by numerous specialists the ministry also provides funds for the in-service education seminars. It is a fact that certain seminars, defined by the law, can be carried out exclusively by faculties – here we are talking about study programs that either give a license for education or due to program renovation, supplement specific knowledge in certain fields and are mandatory as well for teachers as for the state, that orders them from faculties and pays for them being carried out.

The seminars differ in length from at least one-day events to seminars lasting for several days. The majority are two- or three-day seminars.

The whole system is taken care of by a professional body called the Constant Professional Further Education Programming Council, members coming from different professional councils, institutions, principle associations and the union. The end decision is taken by the minister in charge.

In 1998 the field of in-service teacher education of professional workers in upbringing and education got its lawful basis in the Regulation on professional further education of professional workers in upbringing and education and on the process for seminars selection. Herewith the field was defined and also distinct about the role taken in the education and upbringing system.

In this time there was also an intense reform of the school system, that triggered the need for professional further education first of those who had been preparing the reform, later of those who carry it out. At the moment we are in the phase of most extensive school system reform, and in this combination also in a phase of intense professional and in-service education of workers at all levels of education. It is mainly this well built and organized system of constant professional further education that will facilitate and enhance the reform very much, since all participants in the system are already familiar with the ways and forms of seminar preparation and also the participants know the system very well and know what to expect.

The influence of the promotion system on in-service teacher education - Evaluative analysis

In the year 1991 a system of promotion of education and other specialist workers was adopted. It was modified thoroughly in the past years depending on the needs of the modern times. Likewise, promotion the field of in-service training of teachers was also not regulated until 1991. In spite of the fact it had a long tradition, in-service training of teachers was left to the faculties and to faculties of pedagogy, where pedagogical staff was educated. The Faculty of Arts in Ljubljana advanced the most in this field when it established the Centre for Pedagogy Training 25 years ago. It was for a long time the only centre of its kind in Slovenia taking care of service training for teachers. Besides the Faculty of Arts the counsellors of The National Institute of Education and Sports also played an important role. But they could not satisfactorily educate professional educators despite their partiality. Announcements of the special programmes for education and upbringing of professional educators were public as from 1989 but were hard to spot in the professional paper *Prosvetni delavec* (today called *Šolski razgledi*). The introduction of promotion of teachers was a major turning point in the field of in-service training and education of teachers because a system had to be established to provoke a quality shift of in-service training of teachers. In the year 1992/93 the seminars were assessed with points for the first time – just as the rules anticipated.

In the last few years, 1,500 different seminars apply for the public tender each year. These seminars offer education for about 60,000 professional workers, although in reality there are only half as many (about 30,000) holding a job in this field. This means that the seminar offer is for twice as many applicants as there are employed professional workers in upbringing and education.

In the recent years we have also a more detailed evaluative analysis wherefrom we can compare the realization of seminars and executions as well as the realization by participant number and the number of educational days realized by professional workers in upbringing and education. In the last four years we also have a partial quality analysis about the motives, expectations and reactions of the participants in the seminars and of the organizers.

Table 1: The number of seminars published in the programme catalogue since 1994/95 till 2001/02

Year	Number of seminars	Number of organisers	Number of repetitions
1994/95	818	55	1,517
1995/96	679	65	1,464
1996/97	1,049	95	1,470
1997/98	1,208	135	2,497
1998/99	1,491	156	2,277
1999/2000	1,548	170	2,241
2000/01	1,338	155	2,116
2001/02	1,324	175	1,967

Source: Programme catalogues of professional further education of specialist workers in upbringing and education for the years 1994/95, 1995/96, 1996/97, 1997/98, 1998/99, 1999/2000, 2000/01 and 2001/02.

The number of seminars increased rapidly every year and doubled in the six years – except in the year 1995/96, when the tender was repeated and the ministry therefore received and accepted less seminars. The number of seminar organisers is also continually increasing – it tripled in the eight years.

In the last two years the commission of specialists on duty to evaluate and select seminars (The Constant Professional Further Education Programming Council (Program Board)) on the ground of performed analysis of the seminar performance[1] decided to reduce the seminars offer. The analysis showed that in Slovenia it is possible to organize between 600 and 850 seminars regarding the number of attendees and the time frame. There are between 30% and 40% of seminars which are not organised. If more seminars were organised it would result in attendees being too widely dispersed.

1 The analysis is made yearly by The National Institute of Education (Zavod RS za šolstvo), on the grounds of reports provided by seminar organisers. It is also the formal report of the Council for professional education (Programski svet za strokovno spopolnjevanje) named by the Ministry of Education, Science and Sport (Ministrstvo za šolstvo, znanost in šport).

Table 2: Number of participants of in-service education with realized training days

Year	Number of participants	Number of realized training days
1997/98	35,474	2,054
1998/99	41,618	2,594
1999/2000	44,124	4,826
2000/01	35,655	5,339
2001/02	65,770	4,996

Source: Professional education seminar 1997/98, 1998/99, 1999/00, 2000/01, 2001/02 realization analysis

The number of participants in the seminar depends on the length of the in-service seminars, which can be seen from table 2, where in the year 1997/98 it began with training for those, who had been renewing curricula and took part in short in-service seminars. In the academic year 1999/2000 there were first some shorter informative seminars for teacher training, later on the seminars were longer, which is also shown in the increased number of realized training days and a smaller number of participants. In the year 2001/02 we introduced an intensive training (shorter and longer in-service seminars) because the new 9-year primary school was going to start in year 2003/04. In the year 2002/03 we expected a similar number of participants and training days as in the academic year 2001/2002.
We also have been monitoring the motivation of the participants for taking part in professional further education for the fourth year. The answers to questions are anonymous, the participants have the possibility to choose two motives or more amongst the offered answers, they can also write down their own special motives.

Table 3: Motives for taking part in further education seminars, 1998/99, 1999/00, 2000/01 and 2001/02

Answer	Year 1998/99		Year 1999/2000		Year 2000/01		Year 2001/02	
	Nr. of answers	*Share*	Nr. of answers	*Share*	Nr. of answers	*Share*	Nr. of answers	*Share*
a) personal desire for knowledge, skill	19,165	*47.95*	17,727	*49.88*	16,867	*49.45*	17,092	*47.36*
b) need on the job	7,256	*18.15*	6,404	*18.02*	6,110	*17.91*	6,777	*18.78*
c) leadership instruction	2,926	*7.32*	2,568	*7.22*	2,427	*7.12*	3,136	*8.69*
d) wish for exchange of experience	7,407	*18.53*	6,316	*17.77*	6,323	*18.54*	6,910	*19.15*
e) title advancement	1,730	*4.33*	1,504	*4.23*	1,332	*3.91*	1,135	*3.15*
f) college's advice	1,099	*2.75*	934	*2.63*	812	*2.38*	923	*2.56*
g) other	384	*0.96*	87	*0.25*	238	*0.70*	112	*0.31*
SUM	**39,967**	***100.00***	**35,540**	***100.00***	**34,109**	***100.00***	**36,085**	***100.00***

Source: Professional education seminar 1998/99, 1999/00, 2000/01, 2001/02 realization analysis

On average almost one half of the participants expressed personal desire for knowledge and skill amongst their motives, also a need on the job pushes them to take part in further education, or else they have a wish for exchange of experience. Some 7% of the participants were instructed to take part by their superiors and only about 4% admitted among other motives only the wish to take a higher title to be the first or second ranked motive according to importance.

Table 4: Expectations of the further education participants, 1998/99, 1999/00, 2000/01 and 2001/02

Answer	Year 1998/99		Year 1999/2000		Year 2000/01		Year 2001/02	
	Nr. of answers	*Share*	Nr. of answers	*Share*	Nr. of answers	*Share*	Nr. of answers	*Share*
a) acquiring new knowledge/topics	16,634	*57.96*	17,950	*53.13*	17,067	*53.85*	16,992	*53.09*
b) exchange of experience	3,658	*12.75*	6,217	*18.40*	5,900	*18.61*	5,811	*18.15*
c) taking part in well performed programs	2,879	*10.03*	3,550	*10.51*	3,622	*11.43*	4,118	*12.87*
d) do something for personal growth	5,362	*18.68*	5,989	*17.73*	4.961	*15.65*	4,999	*15.62*
e) other	168	*0.59*	76	*0.23*	145	*0.46*	86	*0.27*
SUM	**28,701**	***100.00***	**33,782**	***100.00***	**31,695**	***100.00***	**32,006**	***100.00***

Source: Professional education seminar 1998/99, 1999/00, 2000/01 and 2001/02 realization analysis

More than half of the participants expect new knowledge and a bit less than one fifth expect exchange of experience, which is typical of school system renovation, since they want to check their work and compare it with others, where personal growth is of secondary importance. Taking part in well performed seminars is constant and is not changing significantly.

Table 5: Realization of participants' expectations, 1998/99, 1999/00, 2000/01 and 2001/02

Answer	Year 1998/99		Year 1999/2000		Year 2000/01		Year 2001/02	
	Nr. of answers	*Share*	Nr. of answers	*Share*	Nr. of answers	*Share*	Nr. of answers	*Share*
a) no	212	*0.87*	175	*0.71*	1,667	*6.92*	227	*0.96*
b) partially	4,388	*18.08*	4,711	*19.07*	3,468	*14.39*	3,642	*15.34*
c) yes	17,065	*70.33*	16,998	*68.81*	16,298	*67.64*	17,193	*72.44*
d) above expectations	2,599	*10.71*	2,818	*11.41*	2,661	*11.04*	2,673	*11.26*
SUM	**24,264**	***100.00***	**24,702**	***100.00***	**24,094**	***100.00***	**23,735**	***100.00***

Source: Professional education seminar 1998/99, 1999/00, 2000/01, 2001/02 realization analysis

The renovation of the school system on one hand raised the expectations of the participants, on the other hand it also made the participants more critical, since they are expecting much more of the seminar; often they expect ready made recipes and solutions, and because they can not get them this is reflected in their evaluation, which can also be seen in the table and on the graph. It is still a satisfaction to see that, for the majority of participants, their expectations do come true.

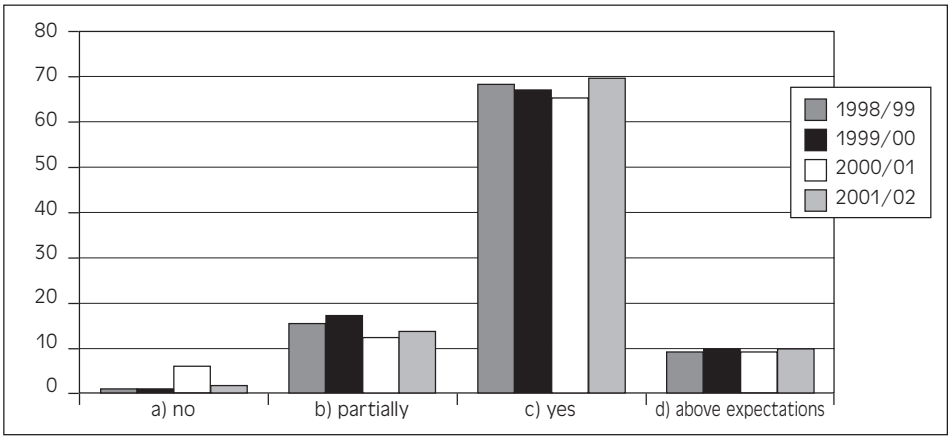

Figure 1: Realization of participants' expectations, 1998/99, 1999/00, 2000/01 and 2001/02

The high level of inquiry for further education is not only the product of the system of promotion. It also shows the real need for education, since the radical changes in the social and economical structure of the society, changes in the educational system, the development of science and technology and numerous other changes dictated the necessity for additional and continuous education.

Besides that, the seminars are organised by numerous organisers (faculties, institutes, private organizations, schools, societies, museums, humanitarian organisations etc.) who variegate and enrich the in-service training with new education designs, methods and techniques. Last but not least – the teachers also emphasize the need and wish for additional knowledge and skills in evaluation questionnaires, which they get to fill out at the end of each organised educational seminar.

Conclusion

The system of in-service teacher education in Slovenia has been built and supplemented for more than ten years and because of its good organization and setting into the school scene it has become indispensable and an irreplaceable support in the school system reform.

The promotion system caused a big shift in the field of in-service teacher education, as it triggered the development of the in-service teacher education and enriched it with numerous new themes and above all new work forms and methods, and at the same time it encouraged teachers and other professional workers in upbringing and education to take part in programs of further education.

The professional workers in upbringing and education already know very precisely what to expect and their expectations are rising and they are becoming more and more demanding, since it is the hardest thing to satisfy those who are educators themselves.

To assure high motivation of the teachers for professional further education and at the same time effective and successful work, their participation should be voluntary. We've come to the finding that, in spite of the fact that professional further education is partly induced by the promotion system, it still has a positive impact and also well on the differentiation of different education forms and methods, on the varied offer of different seminars as on the seminar organizers – and last but not least – the teachers also emphasize the need and wish for additional knowledge and skills.

Everyone benefits from this, especially the pupils for whom this system was formed in the first place. Their teachers and other professional workers in upbringing and education are constantly taking part in in-service teacher education to complete their knowledge, which is the basic goal and purpose of this system.

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EDUCATION AND TEACHER MOTIVATION TO LEARN

Bogomir Novak

Abstract

Teachers participate in the lifelong learning process because of increasing demands for their complex professionalism, the changing school paradigm, i.e. from a transmissive to a transformational one, increasing needs for quality teaching, the changing programmes of teacher education and the fact that school is becoming instrumental for information society. Teachers have to teach pupils and themselves how to learn and be motivated to learn. There are three types of motives: (1) extrinsic motives that have been dominant for a long time, (2) intrinsic motives of self-actualization, and (3) interactive communicational motives. The paper investigates the point when the new paradigm calls for intrinsic and interactive motives and why the routine teachers cannot accept that whereas, teachers with a mission can. The idea of a good teacher and of quality teaching has been championed in Slovenian schools for the last ten years. The programmes of teacher education are more comprehensive and better. Teachers' motives include acquiring new knowledge (thus possibly getting promotion), achieving the complex educational objectives of their own subject matter and of the school, personal growth, understanding of globalisation trends, active participation in making the school part of its environment, and promoting themselves as intellectuals or reflective practitioners.

A change in the paradigm shift calls for a change in teachers' motivation to teach and learn

Scientific and technological development calls for constant curricular changes: new contents are added and linked with other disciplines; methods and objectives are changed. Consequently, teachers have to change the concept and method of teaching and their roles. In the past teachers were successful if they transferred the study matter completely. Today a teacher is expected to be innovative, to know how to animate their pupils through teaching. Teachers therefore need to gain additional qualifications in order to learn how to be real professionals and teach in a qualitative manner.

The transformation of the transmissive paradigm into transformational has happened in Slovenian schools only recently. The trend is to globalise and Europeanise the school, changing the function of teaching in relation of learning. Accordingly, the image of good teachers changes, as they become multi-skilled professionals. They are both educating and educated (lat. *homo educans et homo educator).* To be a good teacher for their pupils, they must first learn and teach themselves. In addition to knowledge about the subject they teach, they also need knowledge about learning and teaching. The teacher teaches the learners how to learn by organising the subject systematically and showing how to learn it most effectively. By asking questions, teachers demonstrate how to think about the subject. The best way to learn is for the pupils to ask questions. Thus they will also learn how to be motivated for learning.

Motivation[1] is a process of stimulating an individual's behaviour to achieve a certain goal. We distinguish between the extrinsic, intrinsic and interactive motivation. All three types of motivation are intertwined because they influence each other in the quality of teaching and learning. Interactive motivation as an affinity for cooperative learning, since it is a driving force of the 'interactive communication' (Habermas' expression) that is usually expressed through team teaching, cooperation of teachers according to subjects they teach and through interdisciplinary cooperation, in cooperation between pupils and teachers and among pupils themselves. These new forms are gaining ground only slowly and to a greater extent in some Slovenian schools than in others.

1 According to the most complex definition of motivation, the motivation is an internal state or internal orientation often described as a need, wish or demand, a force activating, driving and orientating an individual's behaviour (*Kleinginna & Kleinginna*, 1981);
- internal disposition or state that orientates and activates a certain behaviour;
- a wish or a need driving and orienting goal-oriented behavior;
- an influence exericised by the needs and wishes on the intensity and orientation of the behaviour.

Franken (1994) added to the definition of the motivation eagerness, orientation and sustainability of behaviour.

Education presupposes different classes and subject matters, learning and lifelong learning[2] in teachers' case. Curricular reform of Slovenian primary and secondary schools - completed in 1999 - has not changed only subject matters but also objectives and methods of teaching in teachers' training. Differentiated use of teaching methods - as applied in Western Europe - is gaining ground in Slovenia, too. The aim is teaching for creative, quantum, interactive, personally significant, holistic, lifelong learning. Therefore teachers gradually acquire and accept new roles: they are no longer only *transmitters of knowledge* but are becoming *facilitators* of pupils' curiosity, choosing the learning and thinking styles appropriate to their personal capabilities. Thus a teacher is turning into a multi-functional personality with multifunctional motives.[3]

Therefore, in primary and secondary schools, repetition of subject matter is complemented by other forms of knowledge. A teacher has to master these forms before he/she can test and assess pupils' knowledge. It is expected that teachers teach the forms of knowledge they acquired in their training (officially required or voluntary training). Teachers-to-be acquire various forms of knowledge as part of their undergraduate education. Later, teachers enhance their knowledge at professional training seminars with a view to improving the quality of their teaching. Professional training can be organised as a seminar, a course, ex-cathedra lecture or as a research study. The aim is thus to go beyond the declarative learning, which is foreseen by the programme, unchangeable in its content and with fixed objectives. That kind of learning has been prevalent in schools and undergraduate studies. The well-known European INSET system - the system of permanent teacher professional training - was involved also in Slovenia.[4]

Whether the future teachers decide to become teachers on the basis of external or internal motives determines, in practice, whether they are routine teachers or teachers with a mission. The first consider the changes to be an unnecessary evil while the latter see them as a creative development challenge. Yet there is another factor to consider. Throughout their career, teachers get more and more tasks to carry out, but the routine teachers are not internally motivated to do them. Those teachers who are only informed about the educational changes are not internally motivated to use alternative didactic methods or

2 Lifelong learning is a comprehensive and continuous effort for improving one's knowledge, skills and capacities needed for active citizenship, social connectedness and employability. These three factors contribute to personal growth in all periods of the person's life.

3 According to Maslow's Hierarchy of Needs we differentiate physiological needs, safety, love, esteem and self-actualization also in the processes learning, teaching and teacher education (Maslow, 1976). Interestingly, there is more advice available in books on how to boost pupils' motivation rather than teachers' motivation in Slovenia.

4 1 Inset stands for "in-service training" and means teacher training in State schools during an academic year. The system has origins in the UK. For the Slovenian experience with inset see Razdevšek-Pučko (1997).

use the teaching styles that would encourage pupils to develop their own learning styles. With learning lifelong a teacher's motivation can improve partially but not all teachers participate there equally: only those who want to be good teachers and teach in a qualitative manner participate in it.

The Transformational paradigm[5] does not promote only teacher's cooperation with his/her pupils in classes, which are not *ex-cathedra*. It mainly promotes peer cooperative learning among pupils themselves and holistic learning. The Slovenian nine-year primary school develops cooperation among teachers (cooperation between the groups of teachers teaching the same subject, i.e. vertical teachers' groups; cooperation among schools, i.e. mentor schools, cooperation within the group of teachers teaching the same subject when they prepare for their classes and exchange of experience). But there is no cooperation among teachers during the actual teaching, i.e. team teaching. That is why the classes are not sufficiently interdisciplinary. There is not enough group –based collaboration in political organization, school organization and in the creation of an evaluation school. The new nine-year primary schools have already encountered some problems in promoting teachers' cooperation. Problems range from organizational (when and where) to status problems (more or less experience, junior and senior teachers) and communication problems (the relation between the verbal and non verbal communication).

Transmissive and transformational teaching models differ greatly. The transmissive teaching model is characterised by transfer of knowledge. The prime aim of transmissive teaching is not to develop critical thinking and quality learning (experiential learning in the broad sense of the term, personally significant, holistic learning etc.). Transmissive teaching favours declarative knowledge, i.e. knowledge of facts, while transformative teaching facilitates procedural (modal) and strategic (conditional) knowledge, including the use of procedures and methods (the hyponym is meta-cognitive knowledge).

Due to the dominant transmissive approach in primary and secondary schools, there is not enough long term knowledge anchored in the long term memory that results from self-motivation of all participants in education: it is never a result of external impulses only, which lead to unhealthy competition and hunting for good marks.

The aim of the following table of differences between the transmissive and transformational school is to establish which model motivates a teacher most to learn throughout his life.

5 In the philosophy of science, *T. Kuhn* was the first to question the suitability of a paradigm. He assigned various meanings to paradigm. Theoreticians of the 1980s remarked upon a divide between the old scientific paradigm – also referred to as Cartesian, mechanical, Newtonian – and the new one which is evolutionary, self-organisational, organic and holistic. In connection to this, transition from the transmissive school paradigm (pattern, model) to the transformational is mentioned.

Table 1: Differences between the transmissive and transformational school

Teacher with the role of a facilitator	Teacher with all roles
Unhealthy competition with promotional neurosis in school	School with healthy competition
Effect-oriented school as a burden for pupils	Relaxed school fulfilling the educational needs of everyone
Rigid organisation of the school work	Flexible organisation of the school work
Poorly developed democratic school culture	Well developed democratic school culture
Priority of teaching over learning	Priority of learning over teaching
Prevalence of waiter style (ex-cathedra) teaching	Prevalence of group and individual work
Prevalence of teacher's explanation	Prevalence of interactive communication
Prevalence of non-reflective learning	Personally significant transformative learning – all forms
Average pupil	Individual pupil with personal growth
Prevalence of content knowledge	Various forms of knowledge
Irrelevance of education quality	Permanent development of quality
Teacher as an expert	Complex professionalism of a teacher
Teacher as a transmitter of knowledge	Teacher using all four teaching styles
Individualism of teachers	Cooperation of teachers, team teaching
Empirical and rational thinking	Flexible thinking (including empirical, rational and intuitive)
Teaching of learning contents	Teaching how to learn
Partial teachers' education	Integrative education of teachers (workshops)
Traditional and modern values of education	Postmodern values of education
School as an institution with rational argumentation	School develops rational thinking and emotional competence
Low level of functional literacy	High level of functional literacy
Individual learning	Cooperative learning

What makes a good teacher?

What are the motives of a good teacher?

According to Hassett (2000) good teachers:

- have a sense for purpose,
- have expectations of success for all students,
- tolerate ambiguity,
- demonstrate a willingness to adapt and change to meet student needs,
- are comfortable with not knowing,
- reflect on their work,
- learn from a variety of models,
- enjoy their work and their students.

Particular attention is paid to teachers' capacity to judge the development needs of their pupils and encourage them to learn in a qualitative manner. Teachers are nevertheless still very critical of themselves and of their pupils, since teachers do not have enough opportunities to exchange their experiences - even though Slovenian primary and secondary schools consider it an opportunity to become part of the European networks. Standards for quality school classes rise by strengthening certain factors such as cooperation among teachers teaching the same subject and among teachers and their pupils in classroom, with an open school climate[6] and flexible organisation of schoolwork. A teacher is a "reflective practitioner" who plans and analyses his/her classes in terms of the effects of a combination of transmissive and transformational teaching at meta-level. His/her motives are also influenced by didactical methods.

In Slovenia the concept of a good teacher has gained ground. In addition to distinguishing between authoritarianism and autonomy, standards and consciousness, teaching oneself and teaching others, good teachers know that they will lose in the contest of gaining new knowledge. If the want to remain a good teacher, they have to be even more curious than their pupils.

Since growing educational needs are difficult to satisfy, a teacher becomes a lifelong learner calling for continuous training out of urgency. Teachers can learn how to think analytically and synthetically as well as complement the familiar study matter with new scientific findings. Thus they discover and manage new learning situations, and also encourage pupils to try out new methods of learning and searching for information. The latter includes follow-

6 We distinguish between the class climate determined mainly by the teacher and school climate determined mainly by the headmaster or the school board. The school climate consists of school ecology (school building, equipment, size of the school), milieu (experience, education, socio-economic situation of teachers and pupils, value system), social structure (code of conduct) and school culture (rituals, ceremonies, customs and goals of the institution).

ing up recent events in electronic media. New opportunities open up in interactive scientific centres for teachers. Abroad these centres are up and running, in Slovenia, the House of Experiments of Ljubljana could be considered to be such an interactive centre.

A good teacher is supposed to develop an educational culture of lifelong learning. It is important to differentiate between learning in order to get a good mark and learning for life; between informal lifelong learning and formal learning which takes place in a school; between individual and social learning; learning as an intrinsically human function and learning as a cultivated function. These differences influence the selection of a strategy of efficient learning. The last curricular reform has given the necessary impetus for a majority of pupils and students to make a shift from a lower quality level of learning to a demanding level. The problem is that teachers who have not used experiential teaching cannot encourage their pupils to do it[7]. Clearly, there are many reasons for teachers' learning and training. Motives for learning lie in problem solving - which can be part of interactive communication. Other motives include self-actualization of an individual, school marks, rational understanding of phenomena, achieving goals of parents, teachers and school.

Some teachers' motives for learning are similar to the motives of a pupil. But there can be differences, too. The goal of a pupil with no profession is to learn to be able to practice a profession. A teacher learns in order to teach, i.e. to perform his/her profession as a teacher. For both of them, though, learning is an instinct of curiosity and a way of life. Nevertheless acquiring knowledge means for a pupil to accept it, and for a teacher to give it. Another difference between teachers' and pupils' goals is that teachers have already found a subject that fascinates them whereas pupils do not always share teacher's fascination, especially in primary and secondary schools. A teacher should be motivated to learn in a much more complex way than a pupil, since a teacher needs complex knowledge because of his/her complex professionalisation.[8] The aim of teachers' learning and education is a constant improvement of the quality of classes.

7 Nowadays teachers and pupils can choose also alternative forms of learning:
- spontaneous (in an alpha state) or compulsory learning;
- non-reflective and memory taxing or personally significant, social learning;
- left-sphere or right-sphere learning style;
- passive or active learning;
- uncreative or inventive and creative learning;
- convergent or divergent learning
- experiential learning in the narrow empirical sense or in the broadest reflective and transformative sense.

8 Russell and Korthagen (1995) defined the following phases of the development of teacher professionalization: (1) pre-conjectural, when the teacher is adapting the knowledge according to the pupils' ability, (2) dogmatic and (3) final, when teacher is perfectionising their knowledge and tries to come closer to the pupils' ability, (4) inventive or conjectural; when teachers teach for progress and students are seen as the constructors of theories, (5) emancipatory, when teachers are conversational scientists in the equal and friendly conversation with students and other teachers.

On a more personal note, I was teaching social science in high schools of varying sizes for many years. My self-evaluation shows me that I was more motivated for teaching in smaller rather than bigger buildings; on ground floor rather than on level -1; in morning rather than in the afternoons; in classes with talented pupils; when I had some additional qualifications. I preferred a school climate encouraging own-initiatives, so that I could encourage and assess them in pupils. No change in curricula could ever block own initiative in terms of various working methods to the extent that an unfavourable school management could. I was also working at the National Education Institute for a year as an advisor for the subject "self-management with basic Marxism" that was in vogue in secondary schools from 1974 till 1990. When I was inspecting in schools, I noticed that motivation for teaching the subject differed from one teacher to another. Some teachers enjoyed in gaining additional qualifications related to teaching the subject in question; others not. Some had a routine approach, others preferred problem solving. As a researcher I have been participating in classes of ethics and society in some eight-year primary schools and in classes of philosophy and sociology in the fourth grade of high schools. These teachers were team-teaching these subjects. Pupils regarded that as a change in form and not as a change in the content or method of transmitting the subject matter.

Different kinds of knowledge and skills of a good teacher

Nowadays only a few teachers do what most of them have to do in the future. Most teachers and school management still try to advocate the routine and maintain status quo. Only teachers with a heart for the job develop complex professionalism and educational ethics of relations with pupils, pupils' parents, colleagues and school management. They develop their own teaching styles and reduce their drawbacks.

The capacities belong to teachers' social capital. Teachers acquire the basic skills of social capital (put oneself into the shoes of another person; act appropriately with regard to the situation; be able to understand and interpret the feelings of another correctly; be able to read the emotions of another person) during their undergraduate studies and upgrade them during their postgraduate studies or in teacher training. Admittedly, teachers have not participated enough in the programmes for personal development which would help them to break free from the past patterns of feelings, emotions, thinking and behaviour - crucial in working with young generations. The silver-lining which teachers try to invent in apparently bleak situations comes from their skills to accept, integrate, synthesise and balance conflicting values, positions and beliefs (Kyriacou, 1997). But for this kind of invention they often lack synthetical and psycho-social knowledge and thinking. Teachers could acquire the following types of knowledge on the job in order to achieve complex professionalisation:

- knowledge in their subject matter;
- general pedagogical knowledge (theories, empirical findings, visions, positions on classes, education, school, assessment, derived from pedagogy, didactics and other disciplines);
- psychological knowledge (development particularities and differences between individuals), knowing the process of learning;
- knowledge in special didactics;
- knowledge of curriculum, i.e. the tool of their profession (knowing the relevant legislation, syllabi, organisation of the school system, etc.)
- practical knowledge (action, experience, situation, implicit knowledge), action tool box, practical wisdom, professional skills and competencies, know-how (Marentič-Požarnik, 2000, 6-7).

A new motive for learning is to learn to be successful in learning by choosing a suitable learning style. Holistic learning is expressed in Delors' pillars (Delors, 1996) as learning for living, working, education and cooperation. Everyone should apply that in a balanced way. On the basis of new theories of learning and by understanding these theories, a school reform is possible. Holistic learning is anchored in a holistic person, entails inner motivation and yields best results in the long run. For this, innovative, future-oriented learning is needed but this is lacking in Slovenian schools. Classes which are not oriented to problem solving do not significantly encourage critical thinking.

In the last decade Slovenian school has been promoting the idea of a good teacher and of quality teaching (Gossen & Anderson, 1996). Teacher training programmes have been improved. Teachers are motivated for training in order to: acquire new knowledge, be promoted to a new paying bracket, achieve complex educational objectives of their subject matter and school, be personally growing, understand globalisation, actively involve school in its environment, promote oneself as an intellectual and reflective practitioner. One of the most difficult tasks of teachers is to manage their emotions by putting themselves in the shoes of their pupils and, simultaneously, to create a working and cooperative climate in the classroom.

The quality of classes depends on out-of-school, inter-school and in-school factors. Out-of-school factors underpin curricular reform, school policy, integration of school in the EU programmes (*Socrates, Comenius, Erasmus, Tempus* etc.), school networking (networks of quality schools, of eco-schools, of Unesco schools). Primary schools cooperate in carrying out new curricula. There is also a host of in-school factors. We shall distinguish between the factors related to teachers' work in classrooms, organisation of work in schools and cooperation among teachers. The distinction between out-of-school, inter-school and in-school factors is not rigid, since the same factors can occur at different levels (e.g. staff policy and teachers' training).

Motivation for learning is related to the motivation for thinking. Development of critical thinking is a basic strategic objective of a state (Barle, 1996). We distinguish among empirical, rational, intuitive and flexible types of thinking. Transforming education and transforming learning encourage critical thinking as flexible, holistic, multidimensional thinking more than simple routine or transmissive learning. Development of critical thinking in the Slovene school is both encouraged and impeded. The analysis of the current state suggests what else could be introduced in the thinking and learning styles in specific subject matters. This would require, though, teachers and pupils learning to think (Kolenc, 2000; Novak, 2000) in terms of solving problems by combining all three mentioned thinking styles in the flexible style.

Thinking techniques are not trained; theory of thinking sounds foreign. A myth of self-sufficient thinking (as it occurs in nature) prevails, i.e. without noting the value of thinking when it is cultivated (e.g. to discover the right answers, to test problems that are more finely defined, to discover the logical flaws). These are but some suggestions to develop flexible thinking, which promotes solving problems since it enables a change of the point of view. Process of curriculum planning promotes two-way communication.

Conclusions

Teachers' motivation to teach and learn was researched by using prescriptive and qualitative methods. The paradigm shift towards a transformational school cannot happen without teachers' internal and interactive motivation. Most teachers use the same learning methods they had during their undergraduate education. The routine teachers make use in their teaching of the external survival motives, while teachers with a mission use the self-actualization motives. The former try to patch the holes in their knowledge and skills while the latter try to encourage creative approaches, use various teaching styles and promote various learning styles in their pupils. The paradigm shift can be observed in the teachers' education models which used to be behaviouristic and positivistic and are now personalistic and interactive. The first two types are related to the transmissive school paradigm, while the latter two correspond to the transformational one. As a consequence, teachers' professionalism is not defined in terms of being an expert but rather as being a complex interactive individual. Thus teachers' motivation in terms of their autonomy has to be regarded as a result of synergic and interactive effects of factors coming from inside a school and outside it.

The changes in education imply that the motives of self-actualisation are more and more intertwined with the motives of survival. The routine teachers who do not follow the tendency of improving quality feel worse and worse. Such teachers cannot encourage pupils

to learn creatively because their teaching is not permanent and creative. The tendency to make a shift to holistic learning, thinking and teaching, demotivates some teachers who still work on the principle of a closed classroom; on the other hand, it motivates those who are ready to grow personally and socially reorganise the school work. Due to the lack of social capital in Slovenia, team cooperation among teachers is an extrinsic encouragement and not so much an intrinsic motive. The system could favour a self-image of teachers who are more individually independent and socially dependent and thus have a positive attitude to (planned) changes.

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SELF-DETERMINATION IN DAILY WORKING LIFE[1]

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Abstract

Modern enterprises structure their working organization in such a way, as supports employees of all inner-firm hierarchical levels developing their individual competencies during daily working life. A positive learning culture can be seen as a prerequisite for that aim. The learning culture includes all inner-firm influences on the employees' learning. This contribution focuses on those aspects of the learning culture, which regard motivational conditions of individual competence-development. Particularly, the approach of the Self-Determination-Theory of Motivation has been applied to inner-firm daily working life. A sample of 52 superiors and 108 staff members from German industrial and service enterprises have been tested for differences in the perception of the learning culture at their workplaces. The results show no significant differences between superiors and staff members, which can be seen as a hint at a positive learning culture. From a theoretical perspective the Self-Determination-Theory has proven its fitness for inner-firm working contexts, because all assumed correlations could be found.

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Objectives

Modern enterprises structure their working organization in such a way as supports employees of all inner-firm hierarchies in developing their individual competencies during daily working life. This contribution focuses on motivational conditions of individual competence-development. Particularly, the approach of the Self-Determination-Theory of Motivation has been applied to inner-firm daily working life. A sample of 52 superiors and 108 staff members have been tested for differences in the perception of their workplaces.

Theoretical framework

Modern concepts of work organization (e.g., lean organization: Womack, Jones & Roos, 1990; learning organization: Senge, 1990) stress circumstances in which the employees' individual development of competencies becomes a strategic factor for the future success of companies. The entire staff is seen as the company's potential; inner-firm hierarchies do not differ with regard to learning opportunities (Imai, 2001). Thus, goals of organizational development might converge with goals of educational endeavours.

Whereas there are plenty of contributions and findings dealing with learning processes and their basic conditions in schools, high-schools and universities (Beck & Dubs, 1998; Darling-Hammond & Youngs, 2002), there is a lack of relevant studies dealing with learning in inner-firm daily work life. This is surprising, considering the main messages of modern concepts of work organization. This paper applies the Self-Determination-Theory of Motivation (Deci, 1998), which explains ways of supporting learning processes (Deci, Koestner, & Ryan, 2001).

Self-determination-theory of motivation

Professional learning often occurs incidentally during daily working processes, for instance if the flow of operations is adapted to new demands (Oerter, 1997). Furthermore, professional learning also occurs in formal settings of further education and training. From a constructivistic understanding (Gerstenmaier & Mandl, 1999) learning is an active process, during which learners undertake activities. Those are to be activated, supported, and driven through motivation. The term "learning motivation" indicates process-like events precursoring and conducting learning activities. In this sense one can understand learning motivation as a current condition within the person of the learner. The learning motivation does not only have an effect regarding its height (quantity) on success in learning, but is also directly with regard to its quality. An approach from research on learning and instruction, which directly aims at different qualities of the motivation experiencing, is the self-determination theory of motivation (Deci, Koestner, & Ryan, 2001; Deci & Ryan, 1993).

In a very simple differentiation of motivation-quality, extrinsic can be distinguished from intrinsic motivation. Extrinsic motivation designates a condition of the action regulation, which over outside incentives one released and is not directly linked either with the acting person or with the action. Intrinsic motivation feeds itself, however, from the person or the action. While the authors of the self-determination-theory still on the basis of research from the 70's, according to, which extrinsic granted incentives for action undermine intrinsic motivation factors, assumed an antagonism of extrinsic and intrinsic motivation (Deci, 1975), studies from the 80's led to a revision of this point of view. Ryan (1982) could show that under certain circumstances extrinsic incentives can lead also to a reinforcement of the intrinsic motivation. So it was verified that also extrinsic motivation can be experienced as self-determined. Extrinsically motivated behavior can be transformed to self-determined acting by processes of internalization and integration (Deci & Ryan, 1993). On that basis the approach of the self-determination-theory of motivation (Deci & Ryan, 1993) was developed, the core of which consists of the basic assumption of the importance of following inborn psychological needs determining acting and learning:

- *Need for autonomy:* One wants to experience oneself as free from external restraints and to carry one's own point.
- *Need for competence:* An essential aim of human acting is to experience self-efficiency and one's own competence.
- *Need for relatedness:* Without a social bonding, man could not survive at birth. It is a natural human attribute to strive for integration in social communities.

Krapp & Prenzel took up that approach and broadened it with a concept of pedagogical interest (Prenzel, 1988). According to that concept, the following variants of motivated learning can be differentiated:

- *Amotivated:* That term marks a state without any stimuli for acting.
- *Extrinsic motivation:* That term describes a state in which a person's acting only is driven by external contingencies.
- *Introjected motivation:* In this kind of motivation the process of internalization leads to an integration of external incentives transforming them to one's own aims. Immediate external pressure is replaced by forcing oneself to act without seeing an appeal for oneself.
- *Identified motivation:* That degree of motivation describes a situation, in which the object and content itself offers no or only low stimuli. But action is initiated because of striving for a self defined goal.
- *Intrinsic motivation:* One acts because of incentives lying within the action or the object of action and addressing inner motives. External incentives do not play any role in this kind of motivation.

- *Interest:* Once the temporariness of motivation loses importance and one builds up a stable relation to the contents or objects, one can speak of interest (Krapp & Prenzel, 1992). The object gains in individual or general importance so that one keeps upright the contact with the content or object beyond the learning situation.

From the inborn psychological needs the striving for autonomy is that which can be described independently of concrete persons, whereas competence experiencing is related to one person's competence-profile and social integration - beyond that – and depends on persons in the surrounding. If therefore one focuses from autonomy, and specifies in addition object-referred appeals as benchmarks, the six outlined variants of motivation can be arranged in a two-dimensional pattern: Depending on the extent to which self-determination causes actions, extrinsic motivated acting on the autonomy axis is to be settled low, intrinsic motivated or interested acting however very highly. In analogy for this the amotivated attitude is characterized by indifference in relation to activity contents, interested acting by an extraordinarily high measure of appeals for contents on the axle of appeals for contents.

This approach wins educational purchase, if it is applied to learning processes. Learning processes represent a special kind of activity, and of course the self-determination-theory also fits for the description of the motivation of learning in daily working life. Empirical findings verify the determination of the learning processes through the different motivation variants in emotional and cognitive regard: Amotivation and external regulation are accompanied by rather unpleasant feeling experiences (fear, aversion), whereas self-determined motivated learning (identified, intrinsic, interested learning) is positively correlated with agreeable feelings. Pekrun (1998) underlines the meaning of emotional experiences for the quality of learning, because they substantially affect the learning processes and the attitude referred to the content. In addition, the different variants of the learning motivation affect cognitive processes: Self-determined motivation variants lead to better learning results than external regulated. Thus, with identified, intrinsic motivated or interested learning, knowledge is processed more deeply and better understood. In consequence, the transferability of the learned knowledge becomes more probable (Prenzel et al, 2000, p. 167).

All this gains significance for daily working life, because modern concepts of working organization proclaim structures, in which employees should develop and apply individual competence in the context of their daily work. Under intensified competitive conditions enterprises are faced with changing customer needs. This demands flexible and time-close reactions. The newer concepts of working organization rely thereby on employees' competence, as decision-making processes are decentralized and delegated to the individual per-

sons employed, those in older organization concepts were bundled centrally on a higher hierarchy level (Imai, 2001). The self-determination theory of motivation with its three components of autonomy experiencing, competence support and social relatedness can be seen as a concept, which makes testing prerequisites for learning in daily working life possible.

Self-determination in daily working life

Employees in a working organization fulfill a concrete function, which normally is defined in a job specification, which includes tasks and responsibilities. That function restrains the scope of employees' autonomy. But restricted autonomy is not principally an antagonism, if compared with Kant's theory, which is based on a balance between self-realization and self-restriction (Lempert, 2002).

Inner-firm functions are not only part of job-specifications, but also part of an inner-firm hierarchy, which regulates a subsidiary system of authority. Thus, differences between superiors and staff members arise. Traditional organization systems design superior job specifications with a broader range of tasks and influence than specification for staff members. So far, superiors find better conditions for experiencing self-determination and developing intrinsic motivation. But newer concepts of working organization describe influence and opportunities for designing processes for all hierarchic levels. As current empirical findings hint, also modern organized enterprises sometimes assess hierarchical positions higher than individual competence, especially in critical situations (Harteis, 2002). Additionally traditional socialized superiors do not always comprehend changes of leading philosophies (Brinkmann, 2001). Authoritarian leading behavior affects a decrease of motivation and inhibits learning processes (Baethge & Baethge-Kinsky. 2002).

In enterprises, which want to support learning in daily work, high-level personnel obviously plays an important role. They arrange in their field of responsibility the working field for the employees, which should hold appeals for the development particularly of intrinsic motivation.

Intrinsic motivation cannot be produced externally. Only the conditions can be optimized, which make the developing of intrinsic motivation probable. A work surrounding field can show characteristics which promote or restrain intrinsic learning motivation. According to an empirically secured theoretical model, the influence of conditions on intrinsic learning motivation can be grouped in the following ranges (see Prenzel, 1995; Prenzel, Kramer, & Drechsel, 1998), of those - as already above represented - three are directly related toward the inborn psychological needs, on which the self-determination theory of motivation is developed:

- *Social integration:* The feeling of being connected with others and the experience of care and attention from others affect positively felt emotions, which support the arising of intrinsic motivation (see Deci, 1998). The working atmosphere in the employees' direct working environment contributes to a feeling of safety and relatedness.
- *Autonomy support:* External influences and particularly pressure and obligation can corrupt intrinsic motivation (Deci, Ryan, & Koestner, 2001). If on the job is to be learned intrinsically motivated, employees must recognize degrees of freedom for their learning activities. This does not mean complete acting-freedom, but a support of autonomy by setting clear frames and structures, within which employees can deploy autonomy.
- *Competence support:* Humans strive to experience themselves as being effective on their environment. Intrinsic motivation especially develops in situations in which learners experience themselves as effective and competent (Hannover, 1998). Thus, employees must have the chance to experience that learning activities lead to better problem solutions.

This paper directs its focus toward persons employed in industry and service enterprise. It will be examined how they notice central aspects of the self-determination theory of the motivation. The development of individual competence covers complex learning processes in the broadest sense; in the vocational context thereby the key word lifelong learning is frequently stressed. Lifelong learning means the requirement to cope with contents of the working life from one's own drive and to visit learning opportunities. This learning is intrinsic in the sense of the self-determination theory (Deci & Ryan, 1993), it fulfills the inborn psychological needs of autonomy, competence experiencing and social relatedness.

Research questions

The study focuses on two main questions:

Question 1: Following modern concepts of working organization, superiors and staff members must not differ in the perception of conditions for competence-development. As mentioned above, there are reasons to doubt that all superiors act according to programmatic maxims of the firm-philosophy. That is the reason why superiors and staff members are examined regarding their perception of self-determination in daily working life.

Question 2: In order to secure the findings theoretically, the applicability of the Self-Determination-Theory of Motivation on working contexts should be tested. It is examined if the suggested connections between the perception of the motivational conditions and the specification of motivation-quality occur in this study.

Empirical procedure

Sample

This study covers a sample of *N*=160 test persons, recruited from several German industry and service enterprises. It is divided into two subgroups: n_1=52 superiors and n_2=108 staff members. The recruiting process was organized by contact-persons within the respective enterprises. Thus, the sample is neither a random sample nor a representative selection. Facing the lack of empirical findings in that field, this drawback was accepted.

Instrument

The instrument included rating scales firstly according to the inborn psychological needs. These scales were pre-tested in a pilot study:

- Perception of autonomy (5 items, Cronbach's Alpha = .58)
- Perception of competence (6 items, Cronbach's Alpha = .74)
- Perception of relatedness (6 items, Cronbach'a Alpha = .90)

Secondly, five items for the specification of motivational quality were added. For the analyses comparisons of average values (*t*-test) and Pearson correlations were calculated.

Results

In the findings no bundlings at the endpoints of the rating scales were found. The tests of differences between both subgroups show no significant results:

Table 1. *t*-Test results for independent samples (twosided, df = 158).

	t	Significance
Inborn psychological needs		
Perception of autonomy	1.75	n.s.
Perception of competence	1.75	n.s.
Perception of relatedness	-0.29	n.s.
Specification of motivational quality		
amotivated	-0.58	n.s.
extrinsic	-1.16	n.s.
introjected	-0.70	n.s.
identified	1.46	n.s.
intrinsic	1.23	n.s.

The theoretical coverage confirmed all assumed connections:

Table 2. Correlations between inborn psychological needs and quality of motivation.

	amotivated	extrinsic	introjected	identified	intrinsic
Perception of autonomy	.00	-.15	.15	.25**	.33**
Perception of competence	-.13	-.28**	.30**	.37**	.43**
Perception of relatedness	-.03	-.20*	37**	.20**	.33**

Note. *: p<.05; **: p<.01.

Discussion

The results show good conditions for a positive learning culture. Both subgroups do not differ in their perception, and the ratings referring to intrinsic motivation are judged more highly than those referring an amotivation to extrinsic motivation. This hints at good prerequisites for workplace learning, but this study cannot give an answer, as to whether learning really occurs. For a first step it can be confirmed that the tested sample finds working conditions coping with educational demands.

An interesting detail in the findings is that no contra-intuitive results occurred even though the numbers of items had to be kept low. This speaks in favor of an appropriate figuring of the distinction between self- and over-directed acting.

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WHY DO SOME COMMIT THEMSELVES TO DELIBERATE PRACTICE FOR MANY YEARS - AND SO MANY DO NOT? UNDERSTANDING THE DEVELOPMENT OF PROFESSIONALISM IN MUSIC

Hans Gruber, Stefan Degner and Andreas C. Lehmann

Abstract

Deliberate practice has become a core concept in theories about the acquisition of expertise in professional domains. Experts were more involved than others in laborious training activities over a long period of time that have the only purpose of improving performance (deliberate practice). Spontaneously, individuals only rarely engage in deliberate practice. Therefore, teachers play a crucial role for sustaining practice. From the perspective of adult learning, a basic problem is why some subjects commit themselves in deliberate practice. A study within the domain of professional music playing (here: jazz guitarists), addressed this question. Six expert musicians and 12 semi-experts retrospectively reported about their career in a biographical interview and filled in a questionnaire about working behaviour. In contrast to classical music, jazz experts did not start their career earlier than other individuals; neither did they have more committed teachers. In jazz, the role of a teacher in the domain of classical music seems to be transferred to listening and analysing of recordings of famous musicians. Obviously, teachers' contribution for acquisition of expertise is not merely teaching and instruction but rather supporting students to become members of a community of experts. This sheds new light on the analysis of expertise in different domains and on attempts to foster adult learning.

Expertise: Acquisition of knowledge and enculturation in communities of practice

The investigation of experts, that is, of persons who show exceptional performance in a specific domain, has attracted many researchers in the fields of adult education, cognitive science, psychology, and other disciplines. Expertise is a life-long process; thus, studies about the nature of expertise contribute to the understanding of adult learning and adult education.

Descriptive analyses of expert performance show that the outstanding feature of experts is their knowledge base. Experts have much knowledge available that is well organised and can be retrieved and applied quickly and almost without errors. Reasonably, it is argued that long and intensive practice within the domain is a necessary condition for the acquisition of expert knowledge. In complex domains, experts practised for at least 10 years. Not even the most "talented" individuals can attain outstanding performance without such a period of preparation; most experts have even spent considerably longer (Ericsson, 2003). Another characteristic during the acquisition of experts is that the learners participate in more advanced individuals' activities and thus increasingly become part of a community of practice. Conceiving learning as becoming encultured into communities of practice does not only concern the individual processes during learning, but also the implementation of learning environments in large social contexts, frequently denoted as the prevailing "learning culture". In adult education, enculturation as part of professional learning is of increasing importance (Boshuizen, Bromme, & Gruber, 2004).

In a study of professional work, Wenger (1990) showed that there are large discrepancies between the official agenda of the workplace and what was actually learned and practised at workplaces. Wenger concluded that knowledge and expertise cannot be understood in separation from the social environment in which they are observed. A consequence for instruction is that learning has to be bound to application situations and integrated into large systems with adequate learning culture. Of course this is in particular true for adult learning in complex domains in which application situations naturally arise. Acquisition of expertise can be viewed as a process of enculturation and of becoming a full participant in a community of expert practice. Participation denotes the process by which individuals are working together and with experts in a social setting. Acquisition of expertise thus depends on interactions within a particular social context. Lave and Wenger (1991) conceived learning and acquisition of expertise as legitimate peripheral participation by which newcomers become encultured into a community of practice. The process, by which a newcomer becomes a "full participant" or an "expert", is fundamentally social. Learning as enculturation comprises more than only acquisition of knowledge; it concerns many social

aspects such as ways of speaking, belief systems, social customs and tricks of the trade. Thus, understanding processes of the acquisition of expertise is of utmost relevance for adult education.

Acquisition of expertise through deliberate practice

In detailed analyses of learning processes during the acquisition of expertise, using retrospective methods, Ericsson, Krampe, and Tesch-Römer (1993) found that today's experts differed from other individuals early in their career: They practised more efficiently, had more committed teachers, and showed higher achievement demands. Experts were more involved in laborious training activities over a long period of time that only aimed at improving performance. Such activities are called *deliberate practice*. Spontaneously, individuals only rarely engage in deliberate practice, although they recognise that it would improve their performance. They prefer regular activities that are motivated by inherent enjoyment (play) or external reward (work) (Lehmann, 2002). Therefore, expert teachers are important that persist in deliberate practice, thus offering explicit teaching goals, feedback, and opportunities for gradual improvement through repetition and correction of errors.

Teacher-guided instruction and deliberate practice tend to be closely related. The concept of deliberate practice implies that expert performance is acquired gradually and that substantial improvement of performance depends on the teacher's or coach's ability (Lehmann & Ericsson, 2003). The most important reason for guidance by expert teachers is that in all complex domains, over time, a body of organised experience in the form of knowledge and produced artifacts has been accumulated. Through teachers, this body is shared with learners, because teachers can foresee future skill demands. Expert teachers support learners in becoming fully encultured in a community of expert practice.

Deliberate practice may, however, be quite different in different domains or even subdomains. So far, little is known about such differences. For classical musicians, much practice is work on instrumental technique, supervised by regular visits with a teacher. For jazz musicians, parts of deliberate practice may consist of communal practice with other musicians (Degner, Lehmann, & Gruber, 2003). It might be that jazz musicians show a larger proportion of self-directed deliberate practice and less teacher-guidance that classical musicians.

In their own learning, experts can fulfil requirements that during the acquisition of expertise are left to teachers – setting up goals that have to be reached in order to improve practice, knowing the "culture" of skilled activity. Learning by experts often is self-directed,

they decide on which parts of the skill they need further training, they know the reasons why to continue practising. This addresses the important question of why some individuals commit themselves to deliberate practice for many years, whereas others do not. It is still an open question which role teachers play in early phases of acquisition of expertise, and whether they are indispensable.

Study: Deliberate practice in jazz guitarists

In our study, we investigated the (learning) career of expert and semi-expert jazz guitarists. The domain of jazz music was chosen for two reasons. On the one hand, much is known about classical music (Ericsson et al., 1993), which might transfer to jazz. On the other hand, matters might be different in jazz, for instance concerning the role of formalised instruction and of teachers (Degner et al., 2003). But even if the goal of expert learning – refinement of jazz sound in music performance – offers a variety of interpretations, the characteristics of laborious training activities over a long period of time that only aim at improving performance might be found in jazz as well. Thus, investigating jazz expertise might help to understand better both the role of deliberate practice and the role of teachers for the acquisition of expertise. Evidently, instructional and educational consequences can be drawn.

The domain of jazz guitar: Components of expertise

There is a number of requirements jazz guitarists have to fulfil in daily work: accompanying, repertoire, solo playing, technique, and arrangement. Jazz music, therefore, is a complex domain. Acquiring expertise includes the development of highly professional performance.

Accompanying. In jazz sessions, guitarists often have to accompany and to clarify the harmonic structure of songs in a sophisticated and varied manner. They must be able to react appropriately upon all kind of sequences, alterations, rhythmic and dynamic variations and re-harmonisations presented by soloists during improvisation. Besides the concentration on their own playing, the guitarists have to watch and analyse the soloist visually (breaks, solo entering and ending are indicated with hand signals) and auditively.

Repertoire. Like other jazz musicians, guitarists are expected to have ample knowledge of tunes. These songs should not only be remembered by heart (after rote learning). Typical and famous arrangements and re-harmonisations of well known recordings should be part of the repertoire as well. The guitarists further need flexible internal representations of the harmonic and functional structures of standard tunes which can occur in different shapes in live situations.

Solo playing. Different musical styles exist that describe the competencies of jazz guitarists in solo playing. It is essential to listen, analyse carefully, and test the possibilities of transferring parts of recordings from other instruments to one's own. Extensive knowledge about music theory and the functions of harmonics are helpful but not necessary. But the guitarists need a good visual, auditory and tactile overview over the whole fingerboard of their instrument. They have to remember the common scale and chord voicings in all fingerings, speeds, keys and harmonic contexts. Knowledge about the sound of potential tone material in specific harmonic contexts, is therefore one of the most important aspects of their expertise. Beyond a large repertoire of phrases of other musicians, experts also develop their individual likes and ideas. In jazz, traditional sound ideals do not exist like in classical music. Instead the musicians try to imitate famous musicians and then develop their own individual playing. Such individuality and creativity nevertheless requires highly skilled transformability and plasticity of musical knowledge.

Technique. Little agreement exists about measures of techniques for playing the instrument. Famous players developed their own technique (e.g. Django Reinhardt, Wes Montgomery). Such individual solutions equivalently exist alongside the classical technique (e.g. Charlie Byrd) or the plectrum technique. Integrating the imitation of other instruments and the complex harmonics of jazz requires highly skilled technical competence that needs much practice.

Arrangement. Leading a band or realising own compositions needs basic knowledge about techniques of how to arrange compositions. That skill needs well-trained ears and experience of how to design themes and melodies in different band settings in a variety of ways.

Learning and teaching in jazz

The process of hearing music and the transfer of the heard to one's own instrument are main aspects of learning in jazz. It is less important to have lessons from a teacher about fundamental determinants and characteristics of jazz music. However, it is basic to try to copy music heard as exactly as possible during early stages of learning. This method has one important advantage: Learners expand their sensitivity of perception and musical ear. While trying to transcribe recordings, young guitarists have to listen carefully to the phrasing, the choice of played tones, and the determinants of the structure of the solo. Learners dealing with recordings in such a manner of hearing tend to imitate the role of a teacher simply because he looks for discrepancies between one's own playing and that of the recorded musician. Thus, the role of the teacher might be different from classical music. Enculturation into communities of experts might follow different paths in jazz music.

At least two functions that usually are held by teachers might be taken on by "virtual" musicians that are imitated. First, corrective feedback helps to find the most common fingerings and tricks to play some phrases. Second, the analysis of the theoretical framework of parts of a transcribed solo allows for the identification of characteristics of the style of imitated musician. Hearing jazz and trying to imitate "virtual" musicians often is considered as the appropriate means to take over teacher functions.

Teaching music theory with books and teachers can help to build up flexible competencies because they help to explain, understand, categorise, and generalise musical facts in mind. But it is not an indispensable procedure. Many great jazz musicians do know little about music theory but nevertheless are able to play great improvised solos. Django Reinhardt, who reported to know nothing about music theory, often played complex flatted fifths and sharped sixths. He would not have known that terminology, but was able to use those tones very often and in different contexts. They became part of his personal style. He replaced formal training by hearing, liking, and practising the sound of these intervals. In jazz learning, it is possible to use a self-generated framework determining the possible use of stylistic elements without knowledge of terminology and without the presence of a teacher.

Method

Two kinds of empirical research methods are most prominent in studies on expertise: the contrastive approach, and retrospective analyses. We tried to combine both of them in order to adequately study the domain. Jazz experts and semi-experts (students of jazz music) were compared using a retrospective method. The main idea with using retrospective reports of experts is that they are the most valid and authentic data source. Evidence exists that retrospective verbal reports can sensibly complement cross-sectional methods (Gruber, Weber, & Ziegler, 1996). This was already shown for estimates of practice during musical development (Ericsson et al., 1993; Lehmann, 1997), but not yet in the domain of jazz.

The method being used in this study was split into two parts. First, biographical data of jazz guitarists were collected using an interview. Second, we investigated factors influencing differences in learning efficiency. A domain-specific version of the Inventory of Working Behaviour ("Arbeitsverhaltensinventar", AVI; Thiel, Keller, & Binder, 1979) was constructed to study working behaviour in the domain of jazz.

Biographical interview

The domain of jazz guitar and the acquisition of expertise are supposed to show large variety because of the less academic and less tradition-based instructional system com-

pared to that of classical music. Jazz guitarists still have doubts about the necessity of formal jazz education at Schools of Music and conservatories. As a consequence, large inter-individual differences in the biographical development are to be expected (School of Music vs. self study; taking lessons vs. transcription of recordings; concentrated practice vs. big amount of playing live, etc.). Therefore, interviews were carried out to assess the jazz guitarists' biographies.

In the interview, a number of biographical aspects was assessed for each of the different phases of the musical career (start of playing guitar; start of playing jazz; phase of making the decision to make music as a professional; studying jazz guitar; present time). Thus, a chronological picture of the career was drawn. For all phases of the biography, pre-fixed questions were asked concerning practice (e.g. "How many hours did you spend at that time in a normal week with your instrument?" "How many hours did you practice alone?" "Did you practice without your instrument?").

Information was gathered about the following aspects:

- *Formal biographical data:* name, age, birthplace, education, musical education.
- *Music biography:* time and reasons for the decision to run music as a professional, determinants of this decision.
- *Instrumental biography:* aspects concerning the start of playing guitar and other instruments.
- *Jazz biography:* start of playing jazz, reasons for that decision.
- *Taking lessons*: start of taking lessons, number of teachers, contents of lessons, opportunity to participate at workshops.
- *Giving lessons:* beginnning and place of giving lessons.
- *Privacy:* number and impact of musicians in the subjects' private life.
- *Playing music:* stylistic development, start of playing at sessions, aspects of actual live playing.
- *Practice:* actual practice habits.
- *Rating of 12 activities:* rating of twelve activities (e.g. "practice alone", "practice with others", "taking lessons") on the dimensions "importance for improving performance on the guitar" and "effort required to perform the activity".
- *Rating of 24 jazz activities:* choice of eight activities out of twenty-four considered as most important for improving performance; chosen activities were then rated as in (10).

Inventory of Working Behaviour ("Arbeitverhaltensinventar", AVI)

The variability of inter-individual biographical and developmental aspects of jazz guitarists requires a more differentiated view on factors of working behaviour. Thus, a domain-specific version the AVI was developed.

The original version of the AVI assesses working behaviour of students at schools; the AVI is recommended for school career consultation. The original AVI includes 200 items form-

ing 20 scales (e.g. learning, design of learning environments, learning motivation, learning behaviour).

To investigate the inset of the AVI in domains outside school, the items have to be modified. Gruber et. al. (1996) transferred the AVI into the domain of classical music, fitting for the terminology and tasks of classical professional musicians. Reliability scores after modification were even higher on most of the scales than in the original version as a consequence of the domain-specificity of questions. Therefore, a jazz specific modification of the AVI was used in the present study.

Subjects

Institutional criteria were used to differentiate experts and semi-experts. Experts (n=6) were either teaching at Schools of Music or at well-known public music schools; additionally they were well-established as musicians in the jazz scene. Semi-experts (n=12) studied jazz guitar at Schools of Music in various German cities.

Procedure

The interviews took place at the Schools of Music or at the private homes of the subjects. Interviews were recorded using mini disc recorders. Afterwards, the interviews were transcribed. Additionally, the interviewer took notes. To raise the remembrance of the subjects' biographical data we developed a "time table" showing the age of the subject on the Y axis and biographical variables such as "school and education", "music study", or "taking lessons" on the X axis. Lots of the biographical information was directly written into the time table, so the subjects and the interviewer had a visual perception of biographical and developmental aspects. Additional information was written on prepared sheets of paper.

Questions were posed following a flexible interview structure. The whole interview took about 50 minutes with semi-experts and about 70 minutes with experts. At the end of the interview the subjects were administered the AVI. They filled in their answers at home and then returned it.

Results

Chronological structure of practising. In classical music Ericsson et al. (1993) reported that subjects started playing their instruments at the age of 8 years, from the beginning combined with receiving lessons. None of the subjects in the present study were playing jazz when they began to play guitar. The only significant difference between experts and semi-experts was that semi-experts received lessons earlier than experts; this may be due to the changes in the educational system in jazz music (see table 1).

Table 1: Chronological structure of practising: means (standard deviation in brackets) of the age in years for experts and semi-experts when beginning different phases of their career. Results of *t* tests for means differences for independent samples.

Phase	Play guitar	Receive lesson	Professional	Play jazz	Studies
Experts	13.8 (1.0)	18.1 (1.6)	20.8 (2.3)	20.3 (1.4)	24.4 (1.8)
Semi-experts	11.9 (2.8)	13.1 (3.1)	19.3 (2.0)	20.4 (1.7)	22.8 (1.7)
t test (*df*=16)	*n.s.*	*	*n.s.*	*n.s.*	*n.s.*

Note: * $p < .05$; *n.s.*: not significant (alpha = 5%).

Amount of weekly practising in different phases. Concerning the sequence of the phases, it is important to note that five of six experts decided to become professional musicians after they began to play jazz, whereas this was true for only one of 12 semi-experts. Semi-experts decided to become professional (and begin their studies at the School of Music) before they intensively met the jazz. Concerning the actual practising, one expert told that he is used to block practice phases, so that sometimes he restrains from practising, sometimes he practices 40-50 hours per week. This subject averaged his weekly practice. Significant differences between experts and semi-experts were observed for the beginning of playing jazz and for the studies of music. Experts practised much more than semi-experts (see table 2).

Table 2: Amount of practising in different phases: means (standard deviation in brackets) of hours of practice per week for experts and semi-experts in different phase of their career. Results of *t* tests for means differences for independent samples.

Phase	Begin	Professional	Play jazz	Studies	At present
Experts	3.6 (3.1)	20.5 (13.8)	27.2 (15.5)	43.2 (17.6)	26.6 (14.4)
Semi-experts	5.0 (4.9)	15.4 (15.1)	15.8 (10.4)	17.4 (10.8)	17.7 (10.7)
t test (*df*=16)	*n.s.*	*n.s.*	*	*	*n.s.*

Remark: *: $p<.05$. *n.s.*: not significant (alpha = 5%).

Working behaviour. Experts and semi-experts differed in only four of the 20 scales of the AVI. Even if the danger of alpha inflation is considered, the unexpected direction of effects

is remarkable. Obviously, experts do not represent the "classical" picture of committed and well-organised learners. School learning and learning in classical music differ from learning in jazz. This opens the discussion about generalisation of results from research on expertise across different domains (see table 3).

Table 3: Working behaviour: Means (standard deviation in brackets) of four scales from the jazz version of the AVI (Thiel et al., 1979) for experts and semi-experts. Results of *t* tests for means differences for independent samples.

Scale	Level of pretensions	Motivation for success	Motivation for failure	Designing the learning environment
Experts	18.3 (1.2)	18.0 (1.4)	12.5 (0.6)	21.5 (2.7)
Semi-experts	21.3 (2.2)	21.0 (2.5)	15.6 (3.0)	24.9 (1.6)
t test (*df*=16)	*	*	(*)	*

Remark: *: $p<.05$. (*): $p<.10$ (alpha = 5%).

Importance of jazz activities: Ranking of importance. A comparison with classical music shows that there are many similarities across the domains. However, as expected, hearing the music of others is stressed by jazz musicians, but not by classical musicians.

Discussion

Jazz guitarists started practising in their domain at an average age of 13 years, which is considerably later than classical violin students do, who start at an age of about 8 years (Ericsson et al., 1993). This may be caused by the deliberate decision and wish to play guitar that is not possible at the early age of 8 years. As shown by Gruber et al. (1996), classical musicians usually do not make the choice of the instrument by their own, but their parents do. In our sample the subjects were old enough at the starting point to make a deliberate decision caused by interest. The late start of formal lessons of experts seems to be specific for the domain of jazz guitar playing. (None of the subjects was playing jazz from the very beginning of guitar playing.) Both the late start of playing the instrument and taking lessons does not fit well to general findings in research of expertise and deliberate practice. Nevertheless, subjects managed to become experts. The important role of teachers for achievement of expertise (setting goals, error correction, and instruction) in the domain of classical music is far less important in the domain of jazz. The role of teachers in the domain of classical music seems to be transferred to the listening and analysing of

recordings of famous musicians in the domain of jazz. It is important to note that a thorough analysis of the domain is obviously needed before consequences for instruction and education are drawn.

As expected, the jazz musicians spent a large amount of their time in deliberate practice activities such as "practice alone", "taking lessons", and "practice with others". In contrast to classical musicians, however, jazz musicians ranked the listening to music higher. That corresponds with the theoretical analysis of learning in jazz. Recordings are setting goals of performance, and they fit the preferences of the students and thus enhance their motivation to learn. Trying to imitate a recorded solo, and then comparing one's own playing with the original seems to be effective for error correction. Therefore it is not surprising that the experts did not rank "taking lessons" amongst the five most important activities to improve performance. Looking at the long interval between start of playing and start of formal lessons (four years in the expert group), there is a tendency to design goals of practice individually without teachers. The semi-experts ranked "taking lessons" higher and began earlier with formal lessons. A reason for the latter may be found in the today more developed teaching system of jazz guitar playing. When experts began to practice there were not as many possibilities to get regular lessons for jazz guitar.

The most striking difference between experts and semi-experts is the larger amount of practising in the phases of "begin to play jazz" and "studies". That corresponds with experts' assessment of lower effort of practising alone. For both groups, practising alone is the most important activity for improving performance. However, it is significantly less laborious for experts. It seems as if experts have a greater affinity towards the instrument and practice. One expert said about one year of his study in the USA: "We were practising the whole day, and in the evening we were playing at jazz sessions. In that year we spent only two weeks with sightseeing, all the rest was practising. We wanted to check and understand all that stuff." Experts obviously have so much interest in jazz that they cannot stop practising. Without exception, all experts mentioned that fascination was the reason to start playing jazz, whereas only one of the semi-experts said so. For motivational reasons, arousing interest seems to be more important that formal instruction in the beginning of the career. This pattern might be specific for a domain like jazz in which learning usually is adult learning, because early careers are less frequent.

In their working behaviour, semi-experts seem to fit a more scholarly way of learning jazz. The scale "Design of Learning Environments" includes items like "I regularly take short rests when I am learning." or "I engage in more sport for being more concentrated". Looking at the expert quoted above one can imagine that he does not fit into that scholarly kind of designing learning environments. The scales "Level of Pretensions" and "Motivation for Suc-

cess" are also measuring rather scholarly kinds of performance goals such as "I first practise parts that are appreciated by my colleges and listeners". As mentioned above, goal setting is more individual for experts. Appreciation from colleagues is not an extremely relevant criterion for experts. One of the experts said that after finishing studies, the main goal is to develop personality on the instrument. The results about the working behaviour thus reflect the nowadays developing academic and formalised education system of jazz in contrast to the older, more self-determined learning of the expert group. The motivation to give oneself over to deliberate practice probably is more closely related with the "old" learning approach. However, longitudinal studies are required to analyse the career development of those subjects who today have semi-expert status.

Conclusion

The acquisition of expertise in complex domains is a laborious process that needs deliberate practice during a couple of years. In a number of different domains, evidence was revealed that merely performing the same activities repeatedly on a regular schedule is not sufficient. Further improvements require practice that is aimed only at improvement. However, it is still an open question how learners can be motivated to undergo practice that is not enjoyable. In most studies so far, the stress was placed on the role of teachers was stressed who set up goals, who identify mistakes, and who provide informational feedback. Through these activities, they support learners on their way into communities of expert practice. Many guidelines for adult education programs have been derived from this knowledge about the role of teachers.

The present study within the domain of jazz music suggests a picture of acquisition of expertise that differs in some respects. Similar to the domain of classical music, evidence was found that expert jazz guitarists committed themselves to deliberate practice for many years. However, the instructional and educational settings that fostered deliberate practice were different in jazz music. Listening to and analysing music is of greater importance than taking lessons. Learning in jazz - at least concerning the experts - does not fit well with scholarly and formalised ways of acquisition of expertise.

There is a difference between experts and semi-experts in the amount of practice during the beginning to play jazz music and during studying at the School of Music. Experts practised considerably more than semi-experts. At the same time, experts assessed practice as comparably less laborious than semi-experts did. Obviously, the late start of expert careers in the domain of jazz music avails the opportunity of a different path to deliberate practice and to the acquisition of expertise which might be specific for adult learning. The already existing interest for the domain, and mindful decisions to start learning processes,

create a motivational status that enables learners to undergo deliberate practice even without the presence of a teacher. For the jazz experts, deliberate practice was not as clearly separated from enjoyment and professional reward, as it is reported from other domains like classical music.

The present study thus provides a first step into a deeper understanding of the question why some individual commit themselves to deliberate practice for many years, whereas others do not. A thorough analysis of the domain is necessary, as well as of the nature of expertise in that domain. Only then can, the development of adult education and deliberate practice programs fully pay-off.

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OPENING DOORS: LONE PARENTS AND CARERS LEARN TO EARN

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Abstract

A key concern of modern post-industrial societies, including the EU and its individual member states is to ensure fair access of groups considered at risk of social exclusion to education and workplace opportunities. Lone parents and carers constitute a significant and growing at-risk group of this kind. They present many challenges to adult education: practical, pedagogic and financial. In 1998 the University of Leeds secured ESF funding to work with this group. Since then, the OPTIMISE project has supported over 200 lone parents and careers in an integrated pattern of University level work-related learning, personal and career guidance and work experience at a level permitting use of their academic learning. This paper uses the successful experience of this project to illustrate the range of challenges presented by this group and emerging strategies developed to overcome them. It will:

1. *Outline examples of innovation in recruitment practices, learning skills support, guidance and supported work experience.*
2. *Provide an evaluation of the achievements and limitations of the initiative.*
3. *Contextualise the data, relating it to current theoretical discussion in adult education.*

The outcome will be a factually grounded but theoretically-informed study with conclusions that are transferable beyond the subject and national boundaries of OPTIMISE.

"OPTIMISE has opened a door that was previously closed to me."

Lone parents and carers constitute a significant and growing at-risk group in British and European society, one presenting many challenges to adult education: practical, pedagogic and financial.

In 1998 the University of Leeds secured European Social Funding to work with lone parents and carers and has since successfully supported 230 of them. This paper outlines the main elements of the project, discusses its clientele, describes their achievements and seeks to explain their success. It concludes that the OPTIMISE methodology is effective in supporting this vulnerable group through Higher Education and into careers, and might be developed and extended regionally, nationally and trans-nationally. At the same time, it notes that short-term funding is an inadequate basis to support such work beyond its pilot phase.

Background

Lone parents and carers constitute a significant and growing element of British social structure. A fifth of Britain's families are lone parents and carers. They are over-represented on all the indices of 'social exclusion' (as 'poverty' has been renamed). Sixty per cent live in social housing (compared to 20% of couples); eighty per cent get means-tested benefits (the comparable figure is 20% for couples); they are over-represented among those with ill-health (about 10% are unlikely ever to return to work), they are more likely to be unemployed, or employed below their skills level and they are less likely to have benefited from education than the general population. They and their families help explain the paradox that whereas the real incomes of British families have risen by more than a third in twenty years, child poverty has increased from between five and ten per cent in the 1970s to between thirty and thirty five per cent at the present day. (1)

They are not simply a British phenomenon, (although the incidence of lone parents and carers is higher in Britain than in other European countries such as Sweden), but a characteristic of post-industrial, late capitalist society. Hence the European Union's (EU's) prioritisation of them as a target group for action and (in Britain), the beginning, from 1998 of an active set of policies at national and regional level to address their problems. The drivers for action have been both economic (the cost of benefits dependency) and prompted by motives of social justice.

Within this context, OPTIMISE was a pioneer project. Introduced in 1998 and continuing until the present day, its aim has been to enable lone parents and carers to access Higher Education to improve their job prospects, under the slogan "It's your Turn, Learn to Earn" The project is based in the Office of Part-Time Education (OPTED) of the University of Leeds, a city which has higher than regional or national proportions of lone parents (more

than double in some areas). European Social Fund (ESF) Objective 3 funds between 1998 and 2002 and sponsorship by the Fair Play partnership in 2002-3 have enabled the University to provide a comprehensive programme for 230 lone parents and carers. This comprises (or, since future funding is uncertain, it is perhaps fairer to say this has included):

a. one or two years study on a vocationally-related part-time degree;
b. work experience in a vocationally relevant context in the private or public sector;
c. dedicated guidance and support before, during and after study;
d. a financial support package including free tuition and personal guidance, a small personal allowance to cover travel, books and stationery, travel costs and costs for dependant care.

Although other educational initiatives with lone parents and carers have been developed and a national government sponsored programme is run through the New Deal organisation at more basic education/training levels, OPTIMISE is unique in Britain in offering access to University level study. The project is, therefore, worthy of report and discussion on that count alone. But it has a broader relevance too. The experience of the OPTIMISTs (as they are sometimes known) throws some light on pedagogic issues of common concern. At a more practical level, the project may be relevant for institutions in states about to join the EU, since funds may be made available, for example through the PHARE initiative, to develop it transnationally.

The project was one response to EU funding made available following a British Parliamentary Select Committee's report into Pathways into Work for lone parents. Its report concluded that the key obstacle for lone parents in accessing the workplace was a set of barriers, which it proposed should be removed. Poor access to education and training (or perhaps more exactly training and education) were crucial ones. (2) The OPTIMISE bid and project adopted the language of barriers to conceptualise its approach. The target group, our bids suggested, are at a disadvantage in the labour market because of one or more of the following: their knowledge /expertise is outdated, they lack recent experience of the labour market and information about career choices; they do not have clearly structured routes into the market; they have made 'false starts' on careers broken by other commitments. They have onerous dependant care responsibilities.

Our aim was to remove the main barriers. The barrier of heavy costs was addressed by a financial support package. Lack of up-to-date skills, experience and confidence were to be addressed through various measures, including training in core skills, vocationally relevant Higher Education (HE) study and work experience. Counselling and guidance would also contribute to this, and networking with other students on course would help provide positive role models. The programme would address the barrier of the benefits trap by equip-

ping students to take up a position earning enough to make going to work financially worthwhile. We saw some lone parents and carers as needing to make a gradual transition to full-time work. People on the OPTIMISE programme could work part-time while studying if they chose.

The availability of funding to carry the project forward was, of course, only part of the equation. The University was able to put it forward because it had the skills and resources to develop and deliver it, especially in OPTED, but also elsewhere, through its central services (for example its Careers Service and City and Regional Office), teaching Schools and departments and student union welfare services, structures and systems which could support and develop it. OPTIMISE attracted considerable enthusiasm and support within the University, even among some who might have been thought to be sceptical about mature or part-time students. Support outside the University was also notable: the project was well and generously received and as the OPTIMISTs went out into companies and the local community, they were their own ambassadors.

The students and the programme

During its course some 230 students have passed through OPTIMISE. (3) All have been lone parents or carers, with responsibility for looking after one or more dependants. The carers, always a much smaller number than the lone parents, have included, for example, women and men caring for chronically sick or disabled partners. There are no income limits on eligibility: the programme has been quite intentionally made available to those not on benefits and there have been some middle class OPTIMISTS, just as there have been some men, but both have been exceptions.

Ninety two per cent of beneficiaries have been women, compared to seventy four per cent of our other part-time undergraduates. The average age of the group is 38, with the youngest in their early twenties and the oldest in their 50s. The OPTIMISTs have included eighteen per cent of people from ethnic minority backgrounds, mostly black people, with a smaller number of people of Asian origin. This is a considerably higher proportion than among either part-time or full-time undergraduates. A significant proportion, thirty eight per cent, come from deprived areas as identified by the ESF, some from neighbourhoods having the highest density of housing in Europe, and deprived according to many criteria of measurement. The OPTIMISE students had significantly lower levels of prior educational attainment than other part-time students. More than two thirds did not satisfy the University's basic entry requirements at application, compared to twenty two per cent of other part-time undergraduates. For most, this is the first contact they or their families have had with HE and many saw the experience as benefiting both themselves and their children.

"Time and again at the initial guidance interview" a project manager noted, 'the comment was made that "I want to do well for my kids"'.

The statistical data is, of course, helpful, but only gives a pale and indistinct impression of a varied and remarkable set of people. Most have faced and overcome many of the barriers we identified in establishing the project, an achievement all the more remarkable in some instances because of low levels of self-confidence and self esteem at entry. Sue and Becky are perhaps, good examples of students of this sort. Both are single parents, both from deprived neighbourhoods and neither with a good previous education. Sue, who was 30 when she joined, had been involved in voluntary work with young people with drug problems. She wanted to take Combined Social Studies as a way of learning more and developing a career. Becky, who was 27 when she joined OPTIMISE, has three young children herself and sought a qualification to enable her to work with young children in a professional capacity. But the OPTIMISTs also included Laurence, a man caring for his invalid wife, whose ambition was to study local and regional history so that he could set up small business writing and publishing local histories, arranging exhibitions and lecturing to local groups. He was successful. Or there was Jane who had had a high-powered career as a medical representative in the United States, married late and whose husband had died leaving her with a young baby. She wanted to completely change direction through working with young children. Shazad came with a background in medicine in the Middle East. She took up a place in the Medical Laboratory Sciences programme and went on to become a Clinical Biochemist for the Leeds Hospital Trust and to take an MSc. Collectively the OPTIMISE students have made a great impact on those they have met. Many of those who have worked with them have felt privileged, on occasion even humbled by their energy, determination and drive in the face of sometimes very difficult personal circumstances.

The programme is a very ambitious and innovative one for the University, both in terms of its objectives and of the number and range of support activities it includes. It has built on some important innovations piloted or already in place in OPTED in 1998 and added new distinctive elements to achieve its objectives. The pattern can be most easily explained by following an OPTIMIST through the programme.

Most OPTIMISTs have found out about the programme through a vigorous, dedicated marketing campaign, targetting, for example, libraries, health centres, schools and nurseries. In addition, the project has developed two-way referral links with a range of organisations supporting lone parents and carers. It works in collaboration with the Employment Service, Benefits Agency, Carers' Associations and Lone Parent Organisations across the region. A feature on a prime-time BBC national women's radio programme ("Woman's Hour") brought brief national publicity.

Once students apply, two interlinked sets of activities are set in motion: those required to join the OPTIMISE support programme and those required to become a part-time undergraduate of the University. The process begins with a first, pre-entry, guidance interview. This initial guidance interview establishes whether or not the person is eligible for support, and through an individual needs diagnosis helps clarify ambitions, including the realism of both academic and vocational ambitions. Some people enter the programme with clearly articulated plans and ambitions. For others this first interview was a tentative start on the career path.

Once this first stage is completed, the new OPTIMISE students choose and apply for a course. OPTIMISE offers free study on any of the 20+ part-time degrees and sub-degree awards (Certificates of HE and departmental Certificates) offered through OPTED. The only conditions are that the student has to have any special academic skills required by the course (lack of numeracy is the most frequent barrier) and they have to demonstrate that their choice has a realisable vocational outcome. The most popular courses of study have been Childhood Studies and Combined Social Studies followed by Combined Business Studies and Applied Psychology. Not surprisingly, most students have opted for vocationally relevant subjects. Not surprisingly also, perhaps, the most popular choice for women with immediate and demanding childcare responsibilities has been Childhood Studies, which is a preparation for work in the fast-growing fields of childcare and welfare. But small numbers of students enrolled on courses which had no immediate apparent vocational objective, such as English, Philosophy and History.

All OPTIMISE applicants were interviewed for an academic place in the usual way. Those who did not satisfy University entry requirements, the majority, were set our specially developed mature entry examination. Once accepted, and on joining the University, the OPTIMISTS set to work on their academic studies. They are supported in doing so, in their first year especially, by a range of support measures developed for and available to all part-time undergraduates, special induction arrangements, support in developing learning skills and IT and advice from knowledgeable and friendly staff experienced in issues facing part-time mature students.

In addition, as OPTIMISE beneficiaries, students need to know (as the OPTIMISE Handbook categorises them) about 1. Financial systems (what can be claimed, when and how: including childcare, dependent care, travel, stationery, books, photocopying and printing); 2. Guidance (initial guidance, individual guidance interviews, university careers' service events); 3. Work Placement and the work placement module; 4. Support systems (Staff contacts; weekly drop-in sessions and Mentors. Finally, a section called Forms, Forms and More Forms! alerted students to the not inconsiderable bureaucratic demands imposed by working with the ESF.

The system is comprehensive and integrated. It is also complex and when the programme began contained a number of untried and new elements. In the event, it has worked well.

The achievements of the students

All part-time students juggle multiple responsibilities: study, work and family. Lone parents and carers do so more than most: it is entirely appropriate that a juggler (a figure juggling cash, a book, and a PC) is the logo of the programme. As we have seen, the OPTIMISTS are, as a group, at particularly high-risk academically, are vulnerable in other respects and undertaking a demanding programme. Measuring their achievement appropriately is not necessarily straightforward. For some students, lacking confidence, or a sense of self worth, without an academic background or experience, or much in the way of resources or support, mere attendance at University was an achievement in itself. This dimension of value-added is commonly acknowledged, but hard to capture. In this account, we shall consider, first, the measurable outcomes, in terms of academic and vocational outcomes and secondly, through some of the students' own words, some other measures of achievement.

The academic results have been good. Fifty nine per cent of OPTIMISTs have completed and passed either a 60 credit or 120 credit Certificate course. This is a very similar profile to other part-time students and for a much higher risk group. Many have been inspired to continue to study, either as part-time or full-time students. This is shown by (and affects) the statistics on vocational outcomes.

Early destinations data show that of those who have completed the programme, forty per cent went on to full-time employment immediately and four per cent became self-employed. Fifty six per cent chose to continue their studies. None is unemployed.

There were ninety four (41%) early leavers, many leaving with credits studied and passed. They had many reasons for leaving. A third were only early leavers in a technical sense and in no sense failures or drop-outs. A quarter of those recorded as early leavers left the OPTIMISE programme but not the University. They did so because they were offered and took up a full-time university place, a highly positive outcome indicating great progress made on course. A smaller number (twelve) gave a new job as the reason for leaving, many assisted in this by the skills, knowledge and confidence they had acquired through OPTIMISE. Among 'real' rather than these technical early leavers, some told us that they were unable to study and work and look after their dependants simultaneously. For these, the juggling act was too much at this time. Others found that study strained relationships with family and friends. No one cited dissatisfaction with the programme as a reason for leaving. None was forced, either, to leave through academic failure, although weak students were encouraged to look for alternative paths forward and helped to find them.

Most early leavers went on to positive destinations: half to either full or part-time paid employment and a further third to full or part-time study. Only sixteen left to join or rejoin the unemployed, seven per cent of the cohort for which we have data.

OPTIMISE students, completers and early leavers are asked at exit to say what the impact of the programme has been on them. Some talk about the formal aspects of provision.

The OPTIMISE scheme is excellent. It allows people the opportunity to study and work simultaneously.

[It has] *given me the opportunity to study at university for a degree with financial support.*

Others, however, confirm the findings in the literature by asserting the importance of self-development and in particular the growth of a sense of self-worth, leading to expanded personal horizons.

[It has] *given me an awareness of my value and worth in looking for employment-stopped me from accepting second best.*

It has taken me out of a rut and made me positive and forward-looking rather than resigned to my previous 'dead-end' situation.

"I feel more confident and more focused now than I have done for a number of years. Having the chance to re-start my career by retraining and getting a new qualification has prevented me from having a mid-life crisis!"

Early leavers have been positive too.

"I feel I've benefited tremendously from joining OPTIMISE-although admittedly I've not done too well on the academic side. It gave me a 'breathing space' where I could re-think career options after a very traumatic year in which my marriage ended, I had to leave a job through ill-health and I became a single parent of two young children. "

Early leavers cited a number of positive benefits. Some are related to the programme, like increased academic knowledge and (less frequently) increased levels of employment-related skills and knowledge of the job market. But other sorts of impact: increased self-confidence, increased motivation, broadened horizons and positive effects on family and friends are also cited.

Only two per cent of early leavers have seen it as a negative experience.

Discussion

This is a considerable achievement. OPTIMISE has uncovered a pool of energy and resource among lone parents and carers and devised means of enabling them to begin to develop these strengths. How do we account for its success? The explanation is to be found in a number of elements. There were good foundations to build on; support services (advice, guidance and the chance just to talk) have been well-developed and the work experience

programme has proved robust and effective. Perhaps more than anything, however, it has been the wide scope and integration of the programme which has ensured its success. For the often vulnerable set of people whom it serves, a one-stop shop, staffed by committed and compassionate project staff, able and willing to find solutions to a wide variety of problems was an essential and much appreciated resource. It is also a marked contrast to what experience has taught many OPTIMISE students to expect.

There were, first, good foundations to build on. Some of the main services were already in existence or under development in OPTED before OPTIMISE began. Indeed, it could not have been established without them. An array of strategies and services has been developed at Leeds as a means of supporting non-traditional entrants into mainstream degree level study at a high quality university. These include a specialised recruitment, admissions and guidance and support service extending from pre-entry until graduation. The OPTIMISE programme benefited especially from the part-time mature entry examination scheme, learning skills and IT modules, which formed part of the first year of study and a range of innovations, including learning logs, and careers' development modules that could contribute directly to the programme.

Important as these were, OPTIMISE required the rapid development of systems and services of its own. Some were needed to deliver practical services (allowances, for example) and infrastructure, important and sometimes difficult tasks, but not ones requiring further discussion here. More important, from the point of view of this paper, the entire vocational strand, including advice, guidance and the work placement provision, had to be built up almost from scratch and with some speed. Their effective development and delivery has been crucial to the success of the project.

Advice and guidance were scheduled into the programme from the first. Formal guidance sessions, organised initially with the careers service and supplemented latterly by a dedicated guidance officer, helped students reflect on careers and personal-life needs and the links between them. From this, we came to recognise that, for the students, especially those who came from a recent background of difficulty and perceived failure, confidence and a sense of self worth are not just ancillary to effective study. They are central to it, directly affecting what is achievable pedagogically. This frequently comes up in end of course evaluations.

Apart from the obvious knowledge, I have gained more self-esteem, 'intellectual confidence' and feel to have more of a purpose, i.e. I'm working towards something positive. Also it's been very thrilling and satisfying to achieve reasonably good results.

One consequence, was that as the project progressed, we invested more in support services and introduced assertiveness training and other means of increasing confidence to

study. It is clear from evaluations that these services were highly regarded, and that it was as much the personal as the academic which was valued and needed.

"I had extremely personal problems which I was able to find solutions too effectively."

"One person has helped me both personally and academically... I could not have had any better help with any problems that I had."

The formal aim of OPTIMISE has been to help people with many disadvantages to improve their job prospects. A key means of achieving this was through development of an accredited work placement module linked to a supported work placement within the local economy of at least 2 weeks' duration.

A dedicated OPTIMISE Work Placement Co-ordinator delivered an innovative new 20-credit module. During the module students analysed past choices made and career decision-making criteria in order to move forward. They considered what employers are looking for, the importance of transferable skills and how to ensure they can develop and market these skills for future job searches. The module also included tools and techniques such as CV and letter writing, job search strategies interview techniques and presentations skills.

The pre-placement sessions were followed by individual action planning sessions where students were encouraged to secure their own 70-hour work placement with a local employer or organisation. Relevant placements were secured in a range of private and public sector undertakings and in voluntary organisations. A beneficiary studying law secured a placement in a law firm, for example, and a number of students taking Childhood Studies or Combined Social Studies had work experience in Schools or in agencies such as the Child Protection Unit or the Youth Offenders' team.

There is no doubt that for many students this was one of the most challenging, as well as rewarding parts of the programme. Christine, who studied Combined Social Studies, had a placement with the Surestart scheme, a government agency whose aim is to promote a successful early years experience for children. Christine produced a report into play areas in Dewsbury which was used at ministerial level. She commented

"I have developed valuable skills, especially in organisation, managing tasks, self-development, planning and report-writing which will help me in my future job search. I feel I have overcome my lack of confidence brought about by the stigma of being a single parent and through not working. I have proved my worth to myself and others and feel very proud of the project I have completed during my work placement."

Subsequently, she secured a post as a community worker.

Amy, studying Combined Business Studies, worked on developing a customer loyalty scheme for a large firm of electrical component distributors. This opened her eyes to career possibilities in marketing. *Thanks to the work-placement I now know that the degree is exactly*

what I want to do-I have a better idea of how I want my career to progress and in what direction.

A general finding was that the work placement built confidence, gave focus and increased expectations, both of self and of the employment market. The key reason for OPTIMISE's success, however, has been its broad, integrated approach to its task. This has been necessary to overcome barriers which are often social and psychological, financial and practical, as much as educational or vocational. For individual students, the significant aspects of the programme varied. Some valued the financial package most; others found access to a supportive University education more important. But the formal barriers (educational, financial, and vocational) are not the only ones and not necessarily the most significant. Issues such as low personal confidence, sense of self worth or lack of positive attitudes, for example, have to be addressed if other measures are to be effective. An integrated service, of the kind developed by OPTIMISE, is well placed to achieve this.

Conclusions and ways forward

"I am just so sorry that the project has to finish-not only for myself but for all the other single parents. All the staff is friendly, helpful and supportive. Sessions on CV writing and confidence building were brilliant! I really appreciated Kate [the project manager] dropping everything to help me with my IT assignment..."

There has been general acknowledgement of the value of OPTIMISE. The project has demonstrated, unequivocally, that it is perfectly feasible to bring mature lone parents and carers into HE and hence into professional positions at an appropriate level. However, despite its achievements, OPTIMISE is currently still a pilot project, with no secure future. This is because the welfare package, which contributes essential support, cannot be funded by the University (by any university) from teaching income and has had to be sought through short-term funding. Other valuable projects with lone parents and carers, like the SPAN Study Centre have also found that 'Short term funding raises the issue of whether a service can continue almost before it is established. Longer term funding that allows for scheme development...would help staffs set and meet realistic goals instead of challenging them to succeed against the odds.' (4) In OPTIMISE's case, short-term funding has challenged students as well as staff.

The University is looking for ways to provide a longer-term basis for the support for OPTIMISE's work. Funding is being sought to investigate the feasibility of rolling out the programme on a regional basis, making it available across HE and FE institutions. This might enable a centrally funded service to take charge of marketing, recruitment, benefits, guidance and work experience, referring applicants to the most suitable institution. Economies

of scale and a large increase in lone parents and carers taking advantage of the scheme might result, with clear benefits accruing to them, their children and the local economy. There will of course be costs attached, but it is doubtful whether, if accurately computed, they will be anywhere near as great as those incurred by failing to address the issue.

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THE ROLE OF NON-FORMAL AND INFORMAL LEARNING IN (RE)SHAPING OF ACTIVE CITIZENSHIP.

EVIDENCE FROM RESEARCH IN SIX EUROPEAN COUNTRIES

Angela Ivančič

Abstract

Formal education for (active) citizenship (i.e., in schools) has itself faced uncertainties as "modern" conceptualisations of citizenship have been displaced or eroded by social change. The recent emphasis on lifelong learning and a 'learning society' perspective has highlighted the role of informal and non-formal learning contexts in learning key attitudes and skills. The results of the research project "Education and Training for Governance and Active Citizenship in Europe" suggest that in Slovenia as well as in countries with long established democracies active citizenship is primarily learned by participating, and is not taught at school through formal or targeted educational provision. Skills, attitudes and behaviour needed for successful social action are constructed – learned incidentally – in socio-institutional and cultural processes. What have proved to be effective are not so much the traditional training programmes and courses for adults, but rather the learning environment that enable democratic learning processes and mobilise individual capacities.

Introduction

Nowadays political scientists, theoreticians as well as politicians are very much concerned with the issue of participation of citizens in social and political life. It is argued that all over Europe there is a serious decrease in mainstream forms of participation in political processes, such as voting, membership in political parties and traditional interest groups (class, sectoral, professional); this phenomenon is denoted as 'democratic deficit'.

Various theories attempt to explain civic activism. Following Norris (2002), the most common explanation comes from the modernisation theory. It suggests that common social trends such as rising standards of living, the growth of the service sector, and expanding educational opportunities give rise to an increased interest in public affairs and policy making through direct action, new social movements, and protest groups. The politics of choice appears to be replacing the politics of loyalty, as is reflected through weakening loyalties to traditional structures such as churches, parties and traditional interest groups. Institutional accounts emphasise the opportunities set by the state. Changes in 'the rules of the game' may also account for the trends of participation. Agency theories, on the other hand, focus on the role of traditional mobilising organisations in civil society, notably the way that political parties, trade unions and religious groups recruit, organise and engage activists. And finally, the Civic Voluntarism model developed by Verba and his colleagues emphasises the role of social inequalities in resources like educational skills and socioeconomic status, and motivational factors like political interest, information and confidence, in explaining who participates. They suggest that long-term secular social trends generate the motivation and resources for mass political engagement as citizens become more aware of the wider world of politics, as they acquire norms of civic engagement, and as they develop the cognitive and organisational skills needed for political activity.

In this context acquisition of the knowledge, skills, and attitudes needed to be a successful agent of social changes has become an issue of special concern. For most governments, education is the key political option in political education and in the learning for citizenship. Therefore, it is the most often used measure to encourage economic development as well as greater involvement of citizens at all levels. However, educational interventions are primarily (sometimes even exclusively) focused on formal education (primary and secondary schooling of youth). By contrast, within the EU and in individual member states 'lifelong learning' has become increasingly emphasised. The 'learning society' approach has highlighted the role of informal and non-formal learning contexts. However, little attention has been paid to informal and incidental learning of attitudes, values and skills relevant to citizenship, governance and forms of social regulation. Considering that the pace of social changes in Europe tends to make knowledge and skills gained in compulsory formal educa-

tion of increasingly transient value, these learning processes can no longer be restricted to goal-oriented formal educational contexts. Yet there is the question of what are the learning and teaching strategies that effectively contribute to the development of active citizenship.

This article intends to highlight active citizenship as a learning process with the emphasis on the role of non-formal and informal modes of learning. The analysis is based on the results of the research study 'Education and training for governance and active citizenship in Europe' (ETGACE).[1] Contrary to the mainstream belief that citizenship and active citizenship is primarily developed through formal curricula[2], in investigating education and training for active citizenship the ETGACE project started from the theories emphasising the situated, contextual nature of learning. Furthermore, in addition to the state/political domain it also investigated work domain, civil society and private domain as domains of education and learning for active citizenship.

Conceptualisation of learning for active citizenship in postmodern conditions

The transformation of European society since about the 1970s had been widely designated as a transition from modern to late-modern (post-modern) conditions. Beck (1992) characterises late-modern societies as risk societies. Individuals have to encounter with limits and consequences of modernisation processes. Giddens (1991) points to the emergence of life politics as a politics of life decisions which, on the individual and collective level, have radically altered the existential parameters of social activity. Life politics concern political issues which flow from processes of self-actualisation in the post-traditional context. It is argued that people's participation is no longer limited to the national community.[3] Instead it traverses traditional borders and creates new forms, new partnerships and more complex networks. Inclusiveness and recognition of diversities as important elements

1 The project 'Education and Training for Active Citizenship & Governance in Europe' (ETGACE) was conducted within the Fifth Framework Programme of the European Community. Partners in the project were Belgium, England, Finland, the Netherlands, Slovenia and Spain, with The University of Surrey acting as a co-ordinator. Detailed information about the whole project, its aims and goals, methodological approach and expected results is available on *www.surrey.ac.uk/Education/ETGACE/*

2 For example, *Accomplishing Europe through Education and Training* considered 'primary and peer groups,..., the community, and ... the mass media' as of equal importance with formal education, but focused its attention on developments in curricula, pedagogies, and management at the school level (CEC 1997, pp. 56-62).

3 Norris (2002; Ch.1, p. 3) notes that the process of globalisation leads to one of the clearest political manifestations of this process - the declining autonomy of the nation-state; power has shifted to supranational organisations and down towards regions and local communities. Processes like privatisation, decentralisation, deregularisation, marketisation, all shrink the role of the state. This way decision-making is withered away from public bodies and official government agencies that were directly accountable to elected representatives, dispersing among a number of non-profit and private agencies operating at local national and international levels.

of citizenship are strongly emphasised, which has been rather explicit also in the concept of citizenship promoted lately by the European Union. An investigation into the European policy documents concerning citizenship shows that it has changed from the traditional form based on assuring citizens' rights to modern democracy revitalising active citizenship. More active and participatory citizenship in communities founded on an integrated approach to lifelong learning is encouraged.

One crucial aspect of the changes which have been taking place nowadays is the more explicitly globalised context, which is emerging. Goldman (2001) identifies and discusses three main concerns in relation to the transformation in Europe and the impact of globalisation: a) the dynamics of internationalisation and its impact for future Europe; b) the undermining of the role of the nation-state, and c) the future of democracy. Globalisation appears to challenge the contemporary relevance of citizenship because it blurs the boundaries, both material and psychological, which have made citizenship significant in modernity (Faulks, 2000). It is important to stress the relation between globalisation and the social structure, i.e. how globalisation affects social relations and institutions. According to Castells (1997) the notion 'network' expresses very well the transformations at this level (as well as at the economic and political level).

Marshall's concept of citizenship has been revisited according to new social perspectives. Delanty (2000) identifies five central points in relation with the critiques, not only of Marshall's theory but also of current theories in the field: the challenge of cultural rights, the challenge of globalisation and multiple modernities, the challenge of substantive over formal citizenship, the decoupling of citizenship and nationality and the confluence of private and public domains. In the global society, active citizenship and democracy are related with communities of interest at local, national and international level. The globalisation of democracy and citizenship as well as the pressure to respond to the process of localisation (Cochrane, 1998) may offer a new way of capturing or renewing the idea of active citizenship. In this context, active citizenship is about participation and empowerment. As the most current distinctive characteristic, it is also about new forms of identities and civil action, and these should be seen as the major mechanism relating to the progress of society.

Citizenship provided a strong legitimising identity during modernity and still has a significant role in postmodernity, but new forms of identity building are emerging in a changing society. Therefore, citizenship can be seen as a dynamic identity, always reflecting particular sets of relationships and types of governance found within any given society (Faulks, 2000).

Issues discussed in the literature concerning changing conditions of citizenship relate to identity and participation, which for many are the heart of the concept. In his analysis of

identity in the context of globalisation theory, Castells (1997) claims that identity is the process of constructing meaning on the basis of a cultural attribute, or related set of cultural attributes, that are given priority over other sources of meaning. This internalisation refers to social actors and is constructed through a process of individuation.

Education and learning for active citizenship

Bîrzea (1996) stresses that citizenship is a complex and multi-dimensional reality. It needs therefore to be set in its political and historical context which serves as a reference. He argues that the notion of citizenship has been linked to the underlying legal and psychological concept. Legal concept has a political dimension (relation to civic rights linked to the idea of freedom) and a social dimension (the right to life, work, property, housing, social services etc.). The psychological concept, on the other hand, brings into play the individual and collective capacities which allow citizenship to transcend the legal framework of the contract and become the complex everyday reality. The psychological meaning is linked to the *cognitive and socio-affective instruments* which put the contract into effect: knowledge, opinions, values, attitudes, mentalities, know-how, manners.... In other words, citizenship, from this angle, is the effective practice of democracy. It is thenceforward reflected in behaviour, relations and social actions. The 1995 White paper 'Teaching and Learning: Towards the Learning Society' argues for the encouragement of an active and engaged citizenry possessing the skills and confidence needed to contribute as fully as possible to maintaining prosperity and improving the broader quality of life.

In her Foreword 'Education for Active Citizenship' Edith Cresson acknowledges that "...there is a serious gap between legal citizenship (having certain rights) and actual exercising of citizens' rights as well as being equipped to do so on equal terms[4]". The *cognitive dimension* - information and knowledge upon which citizens can with some confidence take action - is among the three dimensions of active citizenship that she underlines.[5]

Authors such as Veldhuis argue that 'Democratic, socially integrated and active citizens are not born, but are created (reproduced) in a socialisation process. ... [D]emocracy has to be

4 Edith Cresson wrote in her Foreword published with the document: "It should go without saying that learning for active citizenship lies at the heart of our civilisation's aspirations in this regard. This means seeking to encourage people's practical involvement in the democratic process at all levels, and most particularly at European level. I maintain, then, that turning a Europe of Knowledge into reality importantly includes promoting a broader idea of citizenship, which can strengthen the meaning and the experience of belonging to a shared social and cultural community. The active engagement of citizens is part of that broader concept of citizenship, and the aim is that people take the project of shaping the future into their own hands."

5 The remaining two dimensions are the *affective dimension* delineating the attachment to the societies and communities to which citizens theoretically belong, and is therefore closely related to the promotion of social inclusion and cohesion as well as to matters of identity and values; and the *pragmatic dimension* of active citizenship - taking action of some kind.

learned and needs to be maintained' (Veldhuis, 1997, p. 8). In one of the most influential works, Lave and Wenger (1991) emphasise the role of the learner as 'practitioner' whose 'situated learning activity' occurs within a 'community of practice'. Knowledge (or 'knowing') is located in the relations between practitioners (learners), and in the 'social organisation and political economy of communities of practice' (Lave & Wenger, 1991, p. 122). Some authors (Giroux, 1991, 1992; cited in Tsang, 1996, pp. 32-33) argue that 'border pedagogies' - an approach designed "to alert future citizens to the marginalising effects of the totalitarian nature of modernity" - provides a more acceptable base for citizenship education in postmodernity.

In the past, mainly primary ideological associations (political parties, trade unions, churches) have been identified by educational strategies as sources of political and civic activation of citizens while recently, different authors have called attention to the fact that activities and affiliations are more likely to be driven individually or pragmatically (gender, environmental problems, minorities, and the like) (Lyotard, 1984; Bauman, 1993). Moreover, social scientists dealing with late modern societies (Giddens, 1991; Beck, 1997), point to other domains such as work and civil society, and to the private domain as areas of life-experience which may shape active participation of individuals and collectivities in a society.

The approach to the study

The rationale for the study was that the attitudes, skills and behavioural patterns which equip people to participate actively as citizens are not learned simply, or even primarily, through formal or targeted educational provision. They are constructed – learned incidentally – in diverse socio-institutional settings and cultural processes. Moreover they are not developed/learned ones for ever; instead, learning for active citizenship is a lifelong process where agency is constantly shaped and reshaped.

It was also assumed that the process of learning for active citizenship is not limited to the political domain; four learning domains were included in the study: state/political domain, work domain, civil society, and private domain.

Citizenship was approached as an *active* process of involvement and as a participatory *practice* of individuals. (ETGACE, 1999) In this context active citizenship represents a reaction of people while facing new more or less unpredictable situations. These encounters challenge them to be continuously involved in a process of constructing meaning, making choice, taking on responsibilities and dealing with changes in the personal, social and societal context. This process can be understood as creating and recreating one's own biography and telling one's life story in combination with the construction and reconstruction of the environment. It is a process of making meaningful connections and may be conceptualised as 'transitional learning'. (cf. ETGACE, 2001a)

Understanding learning from the perspective of transitions (challenges) in the relation between the individual life course and changing context implies that it is important to look at making meaningful connections as an important element of identity building. Transitions challenge people to reconstruct their identity, and, hence, their relation to others and to the environment. As transitions occur along the dynamic of individual life courses the learning process is neither linear nor one-dimensional.

Taking into consideration the constructs of citizenship where normative, cognitive and psychological dimensions are underlined as well as principal themes in learning theory and social theory (Bloom, 1956; Giddens, 1984), in each learning context three key dimensions of learning were addressed: effectivity, responsibility and identity.

Effectivity - for the purposes of this study also termed *capacity* - is understood as a capacity to make decisions and to act in pursuit of identified goals. This encompasses the ability to plan, to develop strategies and to analyse performance in achieving goals.

Responsibility (*challenge*) represents the capacity to reflect critically on the individual's social situation, and to do so in the dialog with appropriate communities. This underpins broad notions of accountability. Learning to be an active citizen involves taking responsibility for certain social issues; this involves responding to and coping with those issues.

Under the term 'identity' we understand that learning for active citizenship involves process of forming and reforming identity, which can be considered in terms of *connections* between oneself, other people, convictions, opinions and ideals. In relation to each of these learning contexts and dimensions of learning, the effectivity of three potential modes of educational interventions - formal, non-formal and informal - was also investigated.

Analysis of the life stories of 16 active citizens from each of six participating countries, five EU members (Belgium, Finland, the Netherlands, United Kingdom, Spain) and Slovenia, which describe individual life-paths of active citizens served as the main information base in analysing the process of learning active citizenship. The findings have been additionally highlighted by the results of the analysis of national context and of effective educational intervention strategies obtained from analysis of focus groups discussions. (ETGACE, 2001b) Active citizens were selected by national research teams with the support of Advisory panels. The main selection criterion was the acknowledgment by his/her surrounding that he/she was an agent of changes in one of the four learning domains. Two age cohorts were included, 25-40 and 55-70. Males and females have been equally represented. The data is not generally representative and cannot be generalised to the whole population. It is more about 'theoretical (purposeful) representativeness'. (Denzin and Lincoln, 1994) Individual data was collected by applying in-depth interviews. Since elements of individual life

stories that referred to active citizenship were of particular interest, the interviews were semi-structured.[6]

Active citizenship is embedded in individual biographies and in a specific (personal, social) context

Contemporary theoreticians argue that the emancipated individuals do not simply assume the commitments imposed upon them by normative institutions (be they educative, political, religious or other). 'Individualisation' as a general social tendency can also be found in the realm of citizen participation. It is reflected through a diversification of responsibilities people assume, of connections they thereby establish and of the capacities and strategies they draw upon. (cf. Norris, 2002)

The findings from individual life history analysis and expert group data provided by the ETGACE project suggest that the participation in democratic (social and political) processes does not consist of a predefined set of behaviours and attitudes on which – once acquired – people unchangingly rely. Rather, it appears as a divergent and open process in which people continuously shape and reshape their commitment to their social context, facing new challenges and needs, while redefining their identity in relation to (and by participating in) different social groups and issues. When they assume social responsibility and contribute to democratic practices, they do so primarily on the basis of their ethical attitude.

What challenges people to assume social responsibility?

In their activities citizens are driven by a sense of commitment to others, which is most often rooted in notions of (social) justice and care. Our evidence suggests that childhood experience is likely to play an important role in shaping individual agency. The predisposition is often formed early in life, with the family and community playing an important role. Mieki (Belgium) states:

"If you ask me where my interest in active citizenship originated from, I must say it stems from home. I must say that home has been a very determining factor: my dad and my mum were both part of a youth movement, they took on leadership [...]. And we've sucked it with our mother's milk."

A rebellion against the family may also lead to social activation. Ursa (Slovenia) experienced at the age of 10 the divorce of her parents which she came to realise 'was something good

6 More detailed information on selecting respondents, conducting interviews and analysing data is available in: ETGACE, 2001a.

that had happened to her'. Since then she started to develop a critical relation to social injustice and non-solidarity.

Challenges can further arise in confronting personal problems (being ill, excluded or discriminated against) or an injustice done to the others. Marlene (UK) felt oppressed by religion, marriage, society. She tells:

"I grew up thinking that everything everybody else said was true. […] I thought everybody knew better than me. […] At school the priest said that becoming a mother is the most important thing for a woman."

She left school at 15 without qualifications. She lived for 26 years in an unhappy marriage and had five children. But when they grew up, she left. She came into a women's centre to find a job. There she felt safe. She began to help other women in similar circumstances. She said:

"I think that was part of my sudden feeling of women, it was so exciting to think that women were gathering together."

Active citizens themselves do not seem to recognise formal education as a factor challenging them in taking on social responsibility. It may be suggested that formal education can shape individual agency, though often in the background. Some of our interviewees mentioned teachers who had influenced their decisions concerning social participation. Kirsi (Finland) was encouraged by her teacher to become engaged in ecological studies, although she had been interested in studying languages. Mauritz (Belgium) has developed his interest for ethical implications of the evolutionist connection between men and animals under the influence of his professor of bioanthropology. Now he is active in the International league for animal protection.

Certain types of adult education and trade union education may also invoke critical awareness and empower people to act in favour of social causes they identify with. Participation in adult education itself may be for some people an act of active citizenship. This particularly holds true for marginalised groups, such as women, minorities, and individuals from lower social classes. Adult education as a means of shaping active citizenship is particularly expressed by active citizens from Spain and Great Britain. More than a decade ago, Theresa (Spain) started to participate in La Verneda - Sant Marti Centre, a democratically organised agency for adult education. This has introduced several changes in her life. Among others she started to participate in FACEPA where she was a member of a women's group. Now she is actively involved in fighting for women's rights. She is acutely aware of the differentiation between 'academic' women and 'other' women:

"By 'other' women we mean housewives, women with no or lower education levels, because they also have to be taken into account, as academic women already have been. I

think this is how it should be, and since we have not yet been recognised, we want to get the recognition we deserve."

However active citizenship is not always a result of society oriented commitment; some people are led by individual centred needs, such as self-fulfilment, self-actualisation, but also for pragmatic reasons (career development, gaining access to resources, social security). The issues of access to resources and of providing social welfare may perhaps be more explicitly seen in post-transitional countries at the time of transition, when people sometimes faced negative consequences of economic, political and social changes in a rather crude manner. For instance, Olga (Slovenia) started to work professionally for one of the newly established political parties because she was about to lose her job. Her decision was a kind of tread-off: she offered to the party her expertise and got social security in return.

Closely related to challenge is the dimension of connection. In an instrumental sense it refers to social settings of which one is part and the ideas and opinions with which one identifies. As argued by various theorists today, the sense of justice, solidarity and care for others seems less and less grounded in religious affiliations, political ideologies, nationality, and more and more originates in risks connected to enhancement of modernisation. However from the narratives of our active citizens we may realise that quite often the values which guide their activities still rest on clear and coherent 'grand narratives'. The role of social class in shaping one's agency is expressed by Enrique from Spain:

"In order to gain a right you have to fight for it. If we don't work more than 8 hours a day, if we have social security, it is not because we have a government to enact it, but because there was a massive social mobilisation prior to it. No political party intervened. The people have worked for it alone over the past, and we have a historical heritage donated by all those people that have worked for a decent leaving and achieve something in the past. And we want to take that heritage further."

The process of learning how to maintain such values and apply them in everyday life continues throughout life, often within closely-knit organisations and communities. Typical examples are churches and political parties. There were men and women among our interviewees who served their church as professionals and some of them took active part in coping with social issues also outside the Church. Janez (Slovenia), a Catholic priest, founded a community for drug addicts. He believes that helping others is a duty grounded in the Catholic religion.

Despite the process of de-ideologisation many people still attach themselves to ideologically based political parties and movements. Jaap (the Netherlands) was born into a traditional Catholic family where he learned deep commitment to social issues and social organi-

sations. In the 1960s, as traditional Catholic organisations dissolved, he moved to more radical positions but still continued to serve a Catholic organisation. After retirement he became active in a Catholic organisation for the elderly.

Considering our data, a particular profession may assume an important role in shaping individual agency. We may observe that a number of members of certain professions are quite inclined to take responsibility for particular social issues or social groups. Social responsibility seems to be part of their professional identity, their professional mission. These are most often professions related to social services such as health care, teaching, social work, but also law. Some other professions like those in agriculture and forestry, and sometimes modern natural sciences, on the other hand, seem to enable the development of a critical stance towards particular developmental trends and, hence, motivate people to take responsibility for certain issues related to the consequences of enhanced modernity (i.e. environmentalism, people-friendly information society). But perhaps even more typical, in the post-modern conditions citizens do not follow just values instilled during their early socialisation processes. They are forced into a process of comparing different values and finding their personal balance. Hans (Belgium) may represent an outspoken example. In the political domain he had shifted during his life from the Christian-Democratic party towards a left progressive party; then he was for a time politically independent, but returned later to the Socialist party. In the domain of work he searched for the profession that fitted his commitment and finally found a job with a progressive educational publisher. In the civil society, when his children started going to school, jointly with several other parents he established a new school in the spirit of Freinet. When dealing with social issues, citizens are doing so primarily on the basis of their ethical attitude. Gerda (Belgium) found herself challenged by two themes: the environment and the third world but she was unable to influence both. She chose the environment issue because that conviction was more obvious for her. The picture was clearer: we are exhausting national resources, we are driving cars and poisoning the air, etc. In this case she was able to see her contribution much more clearly than in the case of the third world.

Building the capacity for being effective in coping with social issues – effectivity of formal, non-formal and informal education and learning

The affective dimension (challenge and connection) of citizenship alone is not enough for taking a successful action. Citizens also have to develop a capacity for action. In order to be effective in confronting with social issues they need information and knowledge upon which

they can act with some confidence. This is where education and training usually comes most visibly into play.

In addition to shedding light on where and how learning for active citizenship occurs, the study also investigated whether various forms of adult education and learning were themselves helping to reshape active citizenship. How far does formal, non-formal and informal adult learning contribute to the development of new forms of active citizenship in the state, work, civil society and private domain? Narratives of our active citizens clearly demonstrate that individual agency is developed through practice. Active citizenship comes about through learning by participating. It appears that informal learning based on equal participatory relationship most effectively facilitates democratic participation. Enrique (Spain) confirms that 'when one acts one discovers things…':

"Once I entered the group, I became more and more accustomed to it, and I found my place in there. I realised I could contribute my own share and I ended up feeling like I was a part of it and identified with it."

What are specific elements of the group process? The focus groups discussion report from Slovenia mentions a threefold distinction: a) some informal education helps in solving concrete problems, in being up-to-date with current social changes and in understanding and evaluating their effects; b) informal learning may support the development of social skills, such as positive self-esteem, communication skills, taking responsibility for oneself and for others and co-operation with others; c) informal learning may foster development of critical thinking, changing of values and breaking of stereotypes. The Slovenian experts were of the opinion that too much attention is paid to the first two types and too little to the third type of informal learning.

Paula (Slovenia) had the opportunity to participate in non-formal learning linked to self-management in former Yugoslavia. She goes:

"With the passing of time you realise that again you acquired some new ways, formal and informal, that a certain problem could be solved […] This then gives experience for the future. If you connect all this, you may get a solid basis for formal and informal work. […] All this lecturing, with one talking and the other listening, they are a little old fashioned and people don't like them. But let's say, some workshops, circles, learning in small groups […]. It attracts people more than let's say other things."

Also, results from focus groups discussions stress the importance of non-formal learning. In particular experts from Spain underlined the need for programmes helping unemployed and excluded citizens to return into paid employment and free themselves from the margins of society. Namely, access to the labour market opens access to participation in other domains. This is particularly true concerning such disadvantaged groups as ethnic minorities.

Authors such as Marshall (1992) emphasise the importance of education and teaching citizenship through formal curricula. The role of the formal curriculum in learning democratic citizenship is underlined in official documents of the European Union. Moreover, educational policies at the national level also mostly address formal education while dealing with this issue (see ETGACE, 2000; ETGACE, 2001b). The empirical data indicating that active citizens often have a better than average level of education, as well as focus group discussions on effective educational interventions, may speak in favour of the significance of formal education for the development of individual agency. They reveal that there is a tendency for well educated citizens, and stress that those poorly educated are in danger of being excluded. It appears that also active citizens themselves feel that low educational achievements are a handicap and need to be remedied. Some of our interviewees told us that their social involvement made them improve their education. They returned to schooling. Charlene (UK) who was rather poorly educated became active in her union, at regional and national levels, dealing with women's and ethnic minority issues. Her work in the union motivated her to return to education. Now she is enrolled on a Master's degree in Industrial Relations. On the other hand, it occurs rather seldom that people go to education and training courses beforehand to obtain knowledge and skills to become active citizens. Majda (Slovenia) makes such a case. She was a very good student of economics. After two years of study she shifted to the College for social workers, as she wanted to work with marginalised groups. During her professional career as a social worker she introduced and promoted various innovations to improve methods of work with these groups. Now she is retired and she devotes her time to organising re-socialisation of prisoners and to promoting advocacy.

The process of learning for active citizenship is determined by social context

One of the important premises considered is that the characteristics of social contexts are important in shaping the relation between the state and the individual. It may be expected that particularities of individual contexts are reflected in issues and groups with which active citizens identify and take responsibility for, as well as through strategies they develop to realise their social responsibility. In different national contexts active citizenship has different meanings and realities.

Our analysis reveals the processes of defining (and learning) active citizenship both on an individual as well as a collective level. On a collective (or cultural) level, the context within which the learning of active citizenship takes place influences the learning of the individual. Active citizens, in as far as they are involved in collective actions, influence the way in

which others learn to participate, and play a part in informally educating others through their activities. It is particularly important that active citizens play a key role in the interfaces between social groupings; in effect, they shape, often unintentionally, the understandings of the members of their groups.

Antonio from Spain states:

"Whatever I know – I depend on my context. How important can I be? What matters is the context you are in! […] We all depend on each other, as it has always been."

The significance of a contextual background most evidently comes forward in former socialist countries. The political changes brought about in Slovenia have opened the door also to those who in the socialist period were for different reasons excluded from political participation:

"When those political changes in Slovenia started to take place, […I realised] that the future depends on as all, and not only on those who have made the decision themselves to direct and pass decision in the name of the others. […] in this place where I live, we founded a political party at the local level." (Miha, Slovenia)

Conclusions

The first and most general observation may be that learning for active citizenship is deeply embedded in individuals' biographies and in the socio-cultural and political context citizens do live in. In an important sense people do not learn a common active citizenship. What they learn is their own citizenship, shaped in an interaction between themselves and the various contexts within which they have lived their lives. The following characteristics of the learning process appear to be most outstanding:

- Learning active citizenship is neither linear nor one-dimensional. The process can be conscious but it is more often accidental, unexpected and ad hoc. In certain countries (the Netherlands, Belgium, perhaps the UK) the individual's sense of identity and responsibility seems increasingly located in the self. This does not mean greater 'selfishness' but can be explained as greater 'authenticity' and 'lifestyle'.
- On an individual level, the role and influence of contextual and biographical elements reveals that learning for active citizenship is not so much a matter of a formal educational curriculum conveying 'convergent' values and skills, but that informal processes are equally crucial. Group learning seems to be of special importance.
- While children's education has been dominated for a long time by traditional teaching methods, adult education was emancipated rather early from this tradition by stressing facilitating methods. Nowadays adult education generally expects and stimulates active learning, i.e. an active role of a learner her/himself. This tendency is also evident in the

education and training for active citizenship. Active citizenship is primarily learned by participating in the process of learning-by-doing, in which acting in every day practice is followed by deliberate feedback, reflection and planning an improved action.

- Formal education appears to be important in the background. Active citizens tend to be well educated; those who lack formal qualifications experience it as a handicap. There is a fear that poorly educated citizens may suffer exclusion. This is especially likely in relation to new forms of active citizenship which are product of postmodern social conditions. Experts from some countries (Belgium, Spain, Finland) are rather critical about the traditional school education as a whole. Schools teach pupils to be good citizens and not how to be active citizens. On the other hand some types of adult education (trade union education, community education) may empower people to take on social responsibility.
- Active citizenship relates to the public, work, socio-cultural and private domain. All contribute to its learning. Active citizens seem often if not always related to more than one domain. What they learn in one domain can encourage participation and commitment in the other – perhaps even for a different purpose.
- Specific contexts are very important in how citizenship is learned. National contexts provide different meanings and realities for active citizenship. In shaping their personal narrative of active citizenship, individuals have to work within (or against) the margins of a collective, pre-given discourse. Inequalities of access to new/changing contexts of participation constrain and shape ability to learn citizenship as well as to be active citizen.

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