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The *Australian Journal of Adult Learning* is an official publication of Adult Learning Australia (ALA). It is concerned with the theory, research and practice of adult and community education, and to promote critical thinking and research in this field. While the prime focus is on Australia, the practice of adult education and learning is an international field and Australia is connected to all parts of the globe, and therefore papers relating to other countries and contexts are welcome. Papers in the refereed section have been blind reviewed by at least two members from a pool of specialist referees from Australia and overseas.

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AUSTRALIAN JOURNAL OF ADULT LEARNING

Volume 53, Number 3, November 2013

Refereed articles

Non-refereed papers

The WEA in Australia 1913 – 2013

Adult Education Conferences in 2013

Book review

Australian Journal of Adult Learning
Volume 53, Number 3, November 2013

From the Editor's desk

Tony Brown

The six refereed articles in this final issue of AJAL in 2013 reflect the diversity of adult education learners and sites of engagement.

Older learners are the focus of the first two articles. **Bronwyn Ellis** considers the experience of a group of undergraduate students in two regional locations who were aged 55 years and over. Surprisingly most of those surveyed intended to use their qualification for vocational purposes and this paper provides data on their motivations, the challenges of study and their experiences.

Glenna Lear also examines the experience of a group of older learners, but in this case six women aged between 58 and 70 involved

in rural based third age learning. Working from a heuristic inquiry approach she worked with the women's accounts of their learning autobiographies out of which emerges a vivid picture of their place in community networks and their civic engagement.

Also investigating change in non-metropolitan sites is **Christina Kargillis**' paper on the learning involved in 'the migration to a new lifestyle that is a part of a 'sea or tree change'. Combining qualitative research with a literature study the paper sets out to understand the difficulties involved within the lifestyle migration phenomena.

Navigating everyday community environments is also the focus of **Michelle Morgan, Karen Moni and Monica Cuskelly**. Their paper presents a close study of three young adults with an intellectual disability and the literacy strategies they use in their daily lives. They describe the literacy strategies as multiple and varied and they draw their data from video recording, visual texts and 'prompting and think-alouds'.

Amy Gibbons and Elizabeth Shannon explore the barriers and benefits of tertiary study for a group of health professionals working in the Tasmanian Department of Health and Human Services. The authors use a 'three capitals' approach to investigate personal, social and economic benefits and identify benefits of improved job performance, increased self-esteem and motivation to learn, while noting the importance of workplace and management support as an important enabler.

Short term overseas study programs and their impact on participants' personal growth in business school environments is the subject of the paper by **Jean-Pierre Fenech, Sylvana Fenech and Jacqueline Birt**.

This November issue of AJAL arrives exactly 100 years after the WEA (Workers Educational Association) was born in Sydney's Trades Hall building on 3 November 1913. As with all anniversaries they invite us to look back to remember and assess.

Why and how was it established? What were its early years like? Was it all smooth sailing? How has it changed over time?

On its centenary anniversary we print three reflections on the WEA. **Denis Binnion** was the WEA Adelaide's Chief Executive Officer for over twenty years leading the organisation into the 21st century. In 2012 he was made a member of the Order of Australia and here he considers the changes that shaped the WEA and believes that it remains capable of adapting to new challenges. **Michael Newton** became the Sydney WEA's Executive Director in 2009 after joining the staff in1991. He too looks back over the history in NSW drawing attention to figures such as Albert Mansbridge and David Stewart and the broad population of students who attended WEA courses. Michael expresses confidence that the WEA can continue to provide liberal adult education into the future. The third contributor is **Roger Morris**, a scholar of Australian adult education history. Rather than a personal account based on involvement in one of the Australian WEAs Roger reviews the formation of the WEA, its development, and the challenges and controversies that are part of its history. Morris argues that there was an inherent tension in the WEA 'model' which he describes as being between trying to maintain 'standards' resembling higher liberal education and a more egalitarian approach associated with another famous figure Lloyd Ross, and that this tension led to declining participation by working people and by working class organisations. Few educational institutions that are independent of the state remain alive and active one hundred years after their formation. The WEA is an exception and its history and continued existence is an important feature of Australia's adult education landscape.

In this issue there is a new feature where seven educators give their reflection on one of the adult learning Conferences they attended during the year. These Conferences are only a selection of those available in any year but they do represent some of the diversity of content and approach in the adult education world. The Conferences discussed here took place in Australia, New Zealand, Canada, Scotland and Brazil, and focussed on Vocational Education, Community Education, Work and Learning, Labor Education,

Comparative Education, and Adult Education in University teaching and research.

Finally, **Michael Christie**, drawing on his own rich and extensive experience of Swedish adult education, reviews a new book on the Swedish experience of popular education in study circles. Interestingly the first Swedish Study Circle organisation was the Workers Educational Association (the ABF) and it was established by a joint effort of the Social Democrat party, the Trade Union Congress (LO) and the Consumers' Cooperative in 1912, one year before the Australian WEA and only seven years after the WEA came into being in England.

Before signing off there is an important acknowledgement and announcement to make.

Over the page you will see a table that lists those colleagues from Australia and across the seas who have supported the Journal this year through refereeing articles submitted to AJAL. I would like to acknowledge their support. Their work goes unnoticed as they provide 'blind reviewing' but without it Journals like AJAL could not exist.

Lastly, you will see that the November issue in 2014 will be a Special Issue. We are issuing a Call for Papers for a Special Issue of AJAL that will focus on *Adult Education and Lifelong Learning in the Asian Century*. Please consider submitting an article if this is an area of your interest, or please notify others, here and abroad, if you know of colleagues working and researching in this area.

Best wishes for 2014.

Tony Brown

People who have reviewed for AJAL in 2013

Scholarly journals depend on the contributions and support of referees in ensuring their ongoing quality. Without the generosity, wisdom, and rigour of our reviewers, the Australian Journal of Adult Learning could not exist. I would like to take this opportunity to acknowledge and thank all those who have given of their time and expertise over the year.

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Call for papers for a special issue on Adult Education and Lifelong Learning in the Asian Century

The 21st-century is often referred to as the Asian century as rapid economic and population growth have shifted attention towards Asia. The Asian Development Bank estimates that the region will account for over half of global output by the middle of this century and an additional 3 billion Asian people could enjoy living standards similar to those in Europe today.

The Australian government has also focussed on Australia's role in the Asian century and set out a strategy for deepening understanding and strengthening relationships throughout the region. This includes building knowledge and capability through trade, cultural exchange, language, and education.

How will adult and lifelong learning contribute to and shape the changes taking place? What opportunities and challenges does this economic growth present for adult educators, policy and research in the field of lifelong learning?

This special issue of the *Australian Journal of Adult Learning*, to be published in November 2014 (vol 54: 3) aims to bring together research contributions on topics such as:

- Extending opportunities for education and training at work, in post-school education, in literacy & numeracy, and within communities, NGOs and social movements
- Economic development and equality
- Health education ranging from challenges associated with rising affluence, to risks associated with low income, disadvantage and under-development
- Learning about climate change and the environment, including management of finite resources such as land, water and food.
- Movements of people and labour as internal migrants to growing cities and between countries

Of particular interest is research on existing partnerships and projects between educators working across borders within the region.

AJAL is a peer-reviewed journal and encourages a variety of academic, historical, practice-based, critical, and theoretical approaches.

Submissions should be between 5,500 and 6,500 words and conform to the AJAL Style, details of which can be found at www.ajal.net.au

Submissions must be made online at www.ajal.net.au by 30 May 2014.

Further information can be obtained by contacting the AJAL Editor Dr Tony Brown at the University of Technology, Sydney, e-mail: tony.brown@uts.edu.au

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Older undergraduate students bringing years of experience to university studies: Highlights, challenges and contributions

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Undergraduate students enrolled through two regional locations were surveyed on their experience of being university students in later life. Students aged 55 and over were invited to complete an anonymous online questionnaire. This collected demographic information, and sought, through open-ended questions, information on their study motivations and university experience. Participants had the opportunity to describe the highlights and challenges of their study experience, including any needs for additional support and facilities. They were also asked to identify the contributions made possible by their greater life experience, and to comment on their relationship with academic and administrative staff and other students.

Most respondents (70%) aimed to use their new knowledge, skills, and targeted qualification in a vocational context; self-actualisation goals also played a part for some. They reported generally relating

well to others at university. Challenges arose from conflicting priorities and some technological issues. Their accumulated experiences helped them contribute significantly to class discussions as they understood the context for the theory they were learning.

Keywords: *lifelong learning, older learners, motivation, higher education, equity, diversity*

Introduction

Focusing on older undergraduate students enrolled in programs available through the University of South Australia's (UniSA) regional sites, this research sought to answer the question: 'What is it like for students aged 55 or more, with all their accumulated life experience, who are studying in undergraduate classes with younger students?' In exploring their study motivations and undergraduate experiences, it was hoped to identify not only any challenges faced, but also the highlights and the contributions made to their classes. Study findings can inform the work of academics and administrators so that they can keep the needs of this cohort in mind and also appreciate the assets that these students can be.

Following an explanation of what prompted this study, current trends relevant to the learning and ambitions of the participants' age group are considered, and the research process and findings are described and discussed.

Background to this study

The genesis of this small, qualitative research study was as follows: in 2008 a survey was conducted to identify the reciprocal benefits of the relationship between UniSA's Whyalla Campus and the local branch of the University of the Third Age (U3A), which it sponsors (Ellis, 2009; Ellis & Leahy, 2011). The questionnaires for U3A members (paper-based) and campus staff (online) included questions on possible formal university enrolment by some U3A members. The latter were asked whether they would be interested in studying

in regular UniSA courses available at Whyalla and, if so, their main motivation. Staff were asked: 'If individual U3A members or other retired people wished to study in a program with which you are involved (whether individual courses for audit or credit, or the whole program), what issues, challenges, and benefits can you envisage for yourself, your other students, and UniSA?' One lecturer remarked: '... 55+ year aged students are already there and coping well, at times better than the younger ones.' This was the catalyst for a survey of such older students enrolled through UniSA's Centre for Regional Engagement (CRE), which incorporates both the Whyalla Campus and the Mount Gambier Regional Centre.

Trends in ageing, employment and learning

While the benefits of lifelong learning are well recognised, and considered an essential part of keeping up-to-date while in paid employment, learning pursuits in later years are often seen as purely recreational for many people, such as those who participated in a small study of a regional U3A group (Ellis, 2006). However, daily living requires constant learning and adjustment to new technologies, new health care systems, and new ways of accessing information.

Demographic trends call for extended working lives. The Australian population is ageing, a trend that is expected to continue. According to Australian Bureau of Statistics (ABS) projections, those aged 65 and over, 13% of the population in 2007, are expected to comprise 23-25% in 2056 (ABS, 2008). Similar trends have been noted in many other countries (Findsen & Formosa, 2011). In Australian regional areas, those over 65 constitute a higher proportion of the population than in metropolitan areas (National Rural Health Alliance, 2009). South Australia, the location of this study, has a higher average age than the national average (*Australian Longitudinal Study of Ageing*, 2006).

As the younger proportion of the tax-paying population gets smaller, there is a greater need for people to work longer (Commonwealth of Australia, 2010). Already, changing financial circumstances are necessitating continued paid employment for many who would have

preferred to retire earlier. Technological changes, along with changing ideas of what constitutes "old age", call for greater workplace flexibility ('Brave new world', 2012; 'Golden age of opportunity', 2012). Skills shortages mean that older people's expertise is increasingly seen as a resource to be tapped (Borowski, Encel & Ozanne, 2007). As indicated in a recent Australian Human Resources Institute (AHRI) survey of human resources practitioners, employers are becoming more aware of the skills lost when older workers (55 and older) are not retained; however, varying degrees of bias against older workers are also noted (AHRI, 2012). Research conducted by Diversity Council Australia (2010) found that age discrimination (at 14%) outranked discrimination on the basis of gender or care-giving responsibilities (8% each). As with failure to retain workers of any age, there are costs involved in recruiting and training their replacements. An Australian Human Rights Commission (AHRC) publication discussing discrimination against mature age workers (aged over 45) shows that ageism and discrimination are continuing challenges (AHRC, 2010); these are also highlighted in a 2011 report by the National Seniors Productive Ageing Centre (NSPAC) as barriers to older people's continuing to work.

Changes with regard to older people's participation in the workforce bring associated learning needs: new skills may be needed because of changing technology or because of changed roles necessitated by physical limitations on earlier work capabilities (AHRI, 2012); some may reskill for a completely new career area; and older workers need to learn of their employment rights and responsibilities. As well as such needs for work-related knowledge, lifelong learning includes preparation for post-retirement years (Findsen & Formosa, 2011).

However, lifelong learning is much more than this, as recognised in one of the seven qualities that UniSA is committed to developing in graduates: a readiness to be lifelong learners 'in pursuit of personal development and excellence in professional practice' (UniSA, 2009a). There are individuals who throughout life have a love for, and engage in, learning for its intrinsic benefits rather than or as well as for extrinsic advantages (Penman & Ellis, 2009). Older people, particularly those retired from the workforce, may find more

opportunity to indulge in learning for its own sake. During UniJam, a recent online consultation about UniSA's future (UniSA, 2013), the following was contributed to discussions about mature aged students:

> Some of us don't have the 'luxury' of access or the wherewithal in our formative years, and as we settle into ourselves some of us become more aware of the opportunities facilitated by formal education... Education is not always about getting ahead or easing ourselves into that new role but it is about making sense of our existence, community, our place in society and our responsibilities. (Cited with C. Murdock's permission)

While some may still think that age automatically brings mental decline, the many examples of people functioning at a high intellectual level in the decades following "normal" retirement age run counter to such ideas (Lear, 2003; 2007). Unfortunately, newsworthy examples tend to be regarded as exceptional, rather than as indicating possibilities for many (e.g., Fewster, 2002; Owen-Brown, 2002; Lee, 2008; A'Herran, 2009; UniSA, 2011). Likewise, research into neuroplasticity, showing that the brain can continue to embrace new learning (Doidge, 2010), indicates that older people should not be overlooked as potential participants in a wide range of learning activities, informal, non-formal and formal, including undergraduate and postgraduate higher education studies. Indeed, older age learning can contribute to developing cognitive reserve, shown by Valenzuela to protect against developing dementia (Newby, 2006). Health benefits also flow from learning about health conditions affecting or potentially affecting learners or their associates, and from the social advantages of learning and sharing in groups (Poshoglian, 2011).

Adult education literature has often taken a broad approach, without considering whether there are particular characteristics of older learners that require educators to have specialised knowledge and skills (Pincas, 2007). The term "mature age" may be used for students aged anywhere between their twenties and sixties or more, and hence it is difficult to generalise. Older students have often been seen as characterised by disadvantage, or having problems or deficits to be addressed (Knights & McDonald, 1982). While the increasingly diverse nature of the student body appears to have lessened this,

one still hears of stereotyping, such as assumptions that *all* older people will be much less computer-literate than twenty-year-olds. Different learning approaches may be preferred as students age: non-traditional learners often focus on gaining a deep understanding rather than rote content absorption, which may strategically achieve better results (Justice & Dornan, 2001). Geragogy, or teaching older adults, is more than simply an extension of andragogy, which relates to adult education in general (Findsen & Formosa, 2011). Withnall, who summarises the growth of educational gerontology as a discipline (2002), also cautions against regarding older learners as a homogeneous group with regard to their expectations of learning, both across current age cohorts and also over time as roles and expectations change. Formosa (2002) describes the development of critical educational gerontology, which proposes principles for putting into practice a liberating education for older people.

Older people's participation in education has implications for societal and individual well-being; possible needs for deferring retirement in an ageing society also necessitate equitable access to education at all levels. Elmore (1999) has argued that social justice demands that older people have access to every type of education. Hence for diverse reasons it is important to facilitate the inclusion of this under-represented group in higher education.

In late twentieth century Australia, policies were implemented to increase the higher education participation of previously under-represented groups. Particular efforts were directed to increasing the inclusion of: people from socioeconomically disadvantaged backgrounds; Aboriginal and Torres Strait Islander people; women in various non-traditional areas of study; people from non-English-speaking backgrounds; people with disabilities; and people from rural and isolated areas (Department of Employment, Education and Training, 1990). While these "equity groups" did not specifically mention older students, new equity initiatives assisted more non-traditional students to participate, such as women who had finished rearing children, including some considerably older than traditional university students. For many, a second chance to access higher education was made possible through bridging/enabling courses that

allowed students to gain prerequisites for higher education programs (Cooper, Ellis & Sawyer, 2000); in UniSA the Foundation Studies program now performs this role (Klinger & Tranter, 2009). Supports to acculturate non-traditional students to university increased. Attention was given to an inclusive curriculum, valuing the difference represented within the increasingly diverse student body (Kaucher, 1994). More recently, the Bradley Review (Department of Education, Employment and Workplace Relations, 2008) sought an increase in numbers of Australians holding bachelor's degrees, through widening participation of under-represented groups.

Research aims, method and significance

Once the CRE Director had given approval and permission to contact students in the study age range, a successful application was made to the University's Human Research Ethics Committee for approval of this project extension. (See Background.) All CRE students born before 1956 were invited late in 2010 to respond to an anonymous online questionnaire. This invitation was repeated early in 2011 in order to include new enrolments and to give those enrolled previously an additional opportunity to participate. Invitations went to Business, Engineering, Nursing, Social Work, and Foundation Studies students. In order to preserve anonymity with such low numbers, students were not asked to specify their study program, which could have tended to identify them, and so informants may not represent all of those programs. As well as questions seeking socio-demographic and university enrolment status information, the survey consisted of open-ended questions, enabling the gathering of rich data. (The Appendix provides the questionnaire items.) The survey used UniSA's TellUS2 software application (UniSA, 2009b), which collated responses; these were then summarised and analysed to identify emerging themes. While face-to-face interviews would no doubt have provided additional insights, the fact that some informants were located in a distant part of the state made interviews less feasible in this unfunded project. The participants in 2010 were, in fact, given the choice to take part in an interview (by telephone for the distant ones), perhaps after their examinations, but none took

up this opportunity. It was also felt that the online option meant that participants could select the most convenient time to respond.

The study's significance is that insights into the lived experience of older undergraduate students could aid the institution to optimise the higher education experiences of other very mature students. This article allows the participants' perceptions to be heard, and provides knowledge for educators to draw on in facilitating inclusive learning contexts; moreover, focusing on ways in which the institution can be welcoming to one group who are not traditional school-leaver students may provide spinoffs for other non-traditional students. In similar vein, Lovegrove suggested that efforts made to ensure the successful participation of Indigenous students would also be conducive to the success of other students (Groome, 1995:82). Raising academics' awareness of particular groups' needs and potential contributions may, it is hoped, make them more likely to extend this sensitivity to all their students.

Findings

The response rate was 40%: of the 25 CRE undergraduate students identified as eligible (20 in 2010 and 5 additional in 2011), 10 completed questionnaires (7 in 2010; 3 in 2011). Characteristics of the participants, none of whom had previously completed university qualifications, are summarised in Table 1.

Table 1: Profile of participants

Sex	females (6); males (4)
Place of residence	regional town/city (5); rural area (3); metropolitan area (2)
Age	55-60 (7); 61-65 (0); 66-70 (3); 71 and older (0)
Year of current university program (full-time equivalent)	first (4); second (4); third (2); fourth (0 – of programs involved, only Social Work had a fourth year)
Year of enrolment	2007 or earlier (3); 2008 (3); 2009 (0), 2010 (3); 2011 (1)
Study mode	internal (5); external (3); mixed mode (2)

Student status	full-time (3); part-time (6); unstated (1)
Number of courses studied this study period	0 (1 had leave for personal reasons); 1 (3); 2 (3); 3 (3)
Previous incomplete university studies	yes (4); no (6)

In what follows, minor corrections (e.g. spelling) have been made to quoted comments for ease of reading.

Earlier experiences of tertiary study, or reasons for not having studied earlier

Only three commented on former university study: one had begun a Business degree but could not continue because of moving to the country; another had studied by distance education, but 'at the wrong time of my life'. The third one bemoaned 'the rigidity of some professors' who found it difficult to accept 'that people with years in practical life have something to contribute'. Two mentioned TAFE training and work-related seminars.

While one student had 'never thought I could or would' study at university, for another, it simply 'did not occur to me to do this'. One had 'married young and had a family and ran businesses', and another had not 'had the opportunity to do so before moving to Whyalla'. Farming and off-farm work had left no time for another to do higher level study.

Main motivation for current university studies

Several offered more than one motivating factor:

Increase/extend knowledge	4
Gain a qualification	3
Increase/enhance (work) skills	2
Increase employability	2
Gain opportunities for advancement or job change	2
'Make a difference'; pass on experience	2
Gain a pay increase	1

So some of the motivation experienced was intrinsic, for the learning itself, 'to keep my brain going', while for others the desire to enhance employment opportunities through the development of

new 'knowledge, skills and techniques' provided extrinsic motivation. Up-skilling requirements were apparent in one respondent's need for a 'qualification to continue working in a profession I enjoy'. One would use the new learning in a volunteer role. Altruistic motivation was also evident in responses that included a desire 'to pass on experience' and 'make a difference to another person's life'.

Challenges faced as an older university student

Two respondents identified no negatives, and one found 'Nothing of significance' a challenge. For one student, the 'costs' were a negative. For another, the 'attitudes of some other students, especially towards older lecturers' was mentioned. One felt that it was 'harder to learn new things than when I was younger'; 'absorbing information given' was also mentioned. Technology featured in some responses: one wrote, 'COMPUTER', and another, 'keeping up with today's lifestyles and technology in communications'. Four mentioned family: 'lack of time for family'; 'family taken a back seat'; 'fitting it round a large expanding family'; and 'having to discipline oneself to study time, not things needed to be done for family'. As well as those time management issues in 'just trying to study', another mentioned the stress 'when trying to get an assignment finished', and for two others there were other time priorities competing with study. Energy and stamina were also limited: 'studying after working all day is very challenging', as was 'to not grow tired and remain excited by learning new technology and skills'. One student joked, 'I'll be ready to retire by the time I finish', but actually hoped for 'seven or eight years of productive work' after graduating. One respondent faced particular challenges from the work environment, with 'poor staff support' when dealing with people in distressing circumstances.

Study mode

Studying externally had positives and negatives for external or mixed mode students. One mentioned the advantages of being able to 'fit my busy lifestyle around it', and also to 'multi-task while listening to podcasts'. For another, external study provided an 'excellent way of maximising time – I can study when it suits me'; this was improved by 'modern technology'. One found it 'quite a lonely journey studying

online'; 'great support' from a particular tutor was mentioned; and one internal student had 'tried one subject [externally] – could not keep up'. One external student 'would have loved to have studied internally – it must be so much more convenient'.

The best things about being a university student

For eight respondents, 'learning' or 'new knowledge' were highlights: 'It is like a whole new world has opened before my eyes'; 'Gaining a wealth of knowledge that I previously did not have'; and 'It is making me use a lot of my brain power which hasn't been put to good use since I left school'. Two students most appreciated the application of this knowledge in 'enhancing my work practice' and in 'gaining formal qualifications', meaning that knowledge was acquired 'in a structured way so that it becomes recognised'. One student most appreciated the external option, which best suited her circumstances. Three found the sense of achievement important: 'achieving', 'the fact that I did it', 'working towards a goal, not sitting back waiting to retire'. People were among the best things mentioned by three students: 'new people', 'helping other students' and 'interacting with others'.

Advantages of greater life experience and the contributions made possible

For one student, 'life experiences, patience and self-discipline' were assets that had been acquired over the years. Experience produced 'life skills'. One felt that this experience compensated for a 'reduced ability to take in new information'. The 'experience of dealing with people who are much less fortunate than I … people struggling on a daily basis to survive their social issues' was of direct relevance to one student's program; likewise another felt able to 'relate to the theory in the uni subjects' because of previous related work. One emphasised that 'younger people have very valid experience as well'. Several found the wider perspective an advantage: 'I understand what I am learning because of lived experiences'; 'I don't get pulled down by minor things. I can see around corners'; it gave 'better understanding on how other disciplines work in with each other'; and 'I can see the value of some parts of a course that others don't'. One felt that 'the students seem to find these experiences interesting and are quite happy to ask me questions'. All respondents felt that they had

contributed to class discussions from their 'life experiences', including life as an older person, and practical applications from relevant workplace experience. Life and work gave 'confidence in contributing in discussions'. One recalled having been asked 'to explain issues by other students, even with lecturer and associate professor there'.

Relating to others in the university community

Relationships were in general positive. Two described the other students as relating 'very well' to them, with another saying that this applied to 'most students'. Another found that it 'depended on other students' attitudes'. This could involve some looking up to them 'for the experience', and one commented that 'other older ones try to dominate in projects'. Other remarks were: 'I get on well with the students in my course'; 'when I meet them, I am readily accepted'; and 'they see me as one of them'. Another considered the relationship one of 'respect – we are all in this together'. One referred to a negative reaction on complaining to students who had talked throughout a lecture; however, other class members expressed approval of the intervention.

Teaching staff related to them 'very well' (2), 'usually very well', 'OK', or there were 'no problems'. One referred to the 'excellent support' they provided, and another said that they 'just treat me as all other students'. One for whom the relationship was 'good' also commented, 'I'm not sure sometimes when I am struggling to grasp a concept whether staff feel I may be a bit set in my ways,' but they were 'generally supportive though'. Another found them 'warm and welcoming'.

Their relationship with administrative staff was also described positively. Although one had 'not had contact', other comments were: 'very good', 'good – as with other students', 'always ready to help', 'very helpful' (2), 'excellent', 'good, supportive', and the staff related 'with kindness'.

Other support or activities/facilities needed

Concerning any physical, psychological, study skills or other support needed, five of the respondents felt that nothing additional was

needed, one praising a tutor's 'excellent support'. One, who felt that he/she was 'managing reasonably well', commented, 'There is never enough time for full-time work, family and study.' Needs mentioned by the others were for 'computer skills', which 'left a lot to be desired', 'skills in how to write assignments, especially to be able to critique myself'; and 'academic writing and research skill with the computer', although 'sessions with library staff' had helped. One also would have liked psychological support: 'My self-esteem can be very low at times.'

No other activities/facilities needed to be provided, according to four, and two others could not suggest any. One felt that pre-entry classes were needed to prepare for some courses. One studying externally found a metropolitan campus 'an excellent centre to study through', and a Mount Gambier student lamented the current lack of a library. Little interest was shown by most of these students in extracurricular activities: some were not interested (3), had 'no time' (2), an external student was 'not very' interested, and another said, 'Not much, as family comes first'. For one, 'other commitments' had prevented attendance at the few regional activities. While one said that such activity 'does not fit in with my age and situation', another was hoping 'to be able to participate in the sports carnival … next year'.

Encouraging others to study

All respondents said that they would encourage others of their age cohort to consider studying at university. One added, 'without hesitation', another already gave this encouragement, and yet another wrote, 'Just do it!' One described it as 'a new door for me and my family'. One response commended a particular campus, as 'they really care about your progress'. One longer comment was:

> One is never too old to study, although with other responsibilities as you are older one must balance work/study and life, family children, grandchildren and wife and own brothers and sister, mum and in-laws all getting older.

Discussion

As mentioned in the background section, a 2008 staff survey response claiming that students of 55 years of age or more were managing as well as or better than younger ones prompted this small additional study. Some other responses to the same question (relating to anticipated issues, challenges, and benefits that such older students could bring) allow for some comparison of staff perceptions at that time with those of older students more recently, particularly with regard to challenges and contributions.

Staff saw potential involvement of interested retired people as regular UniSA students as potentially advantageous, but perhaps also requiring additional support. They highlighted possible contributions. The knowledge and 'life experience' that these students would bring could enrich classroom discussions:

> … I think that they could contribute much from the wisdom and experience they have gained over the years.

Cross-generational learning, according to one lecturer, was potentially 'richer and broader'. Their presence would 'highlight for all students that one is never too old to learn and the importance of learning for knowledge sake not just for a piece of paper!' Staff beliefs about older potential students were supported by students' estimation of their contribution in this later survey. Bunyan's Irish study (2003) also found that age diversity in a class was a positive for both young and old.

On the less positive side, some staff thought that older students returning to study after some years might need 'significant support', perhaps lacking familiarity with the technologies so integral to studying today – something that several of the students surveyed mentioned as a challenge, along with the need to develop academic research and writing skills. Some thought that the 'generation gap' between older and younger students might be a problem, and that costs could be prohibitive (as one of the students mentioned). They recognised that 'different learning style and preferences' could be an issue; however, such preferences are not uniform in younger

cohorts (Bunyan, 2003). Nevertheless, staff felt that students with the prerequisite knowledge would cope. One lecturer mentioned the possibility that some seniors' physical limitations might prevent them from carrying out particular tasks, such as nursing students lifting patients, but also recognised that there were types of future work (e.g. nurses engaged in health promotion) where this would not be a deterrent. One aspect lacking from the staff comments was mention of students' other commitments, and time management and work/study/family balance issues. This has also been identified in recent times, not only in Australia, as an issue for younger students who tend to have more off-campus commitments than in earlier decades, with implications for the nature of student engagement (McInnis, 2001; Babcock & Marks, 2010; James, Krause & Jennings, 2010).

Just as motivation can be attributed to factors within and beyond the learner (intrinsic and extrinsic factors, respectively), so can barriers to learning. Drawing on earlier work by Cross, Bunyan (2003) described difficulties faced by her study participants, both young and older, as dispositional (such as negative past educational experiences), situational (such as those arising from their family or work situation) and institutional barriers (such as lack of understanding of requirements and university culture). Others have classified these barriers as internal (similar to dispositional) or external (outside of the individual or the individual's control) (Falasca, 2011), or added an informational one (Findsen & Formosa, 2011, citing Darkenwald & Merriam), which could be regarded as connected with institutional barriers. The responses showed that these participants experienced these barriers to varying degrees. All potential barriers need to be taken into account in fostering a safe, diversity-welcoming learning environment; age sensitivity and age inclusiveness are both important.

A staff member in the earlier survey identified a broad age group within classes as leading to 'less competition between students' and so, presumably, a more cooperative learning environment. The students surveyed in general found relationships with other students, as well as staff, satisfactory. A student magazine orientation guide

includes an interesting student perspective, at least recognising the presence of older students:

> There will be people in your tutes who are older than you. They are not lost and will get annoyed when you ask them where they're supposed to be. ('a²z of your uni', 2010:25).

Limitations of this study arise from the low numbers (albeit a good response from those eligible) and the self-selection of participants. With the earlier data from staff (2008 U3A-UniSA study), it is possible to make some comparisons between older students' perceptions and those of staff with regard to how the students fit it, their contributions and challenges. However, in the later study, only the older students were surveyed – younger students were not asked about their relationship with them. In this study students' perceptions have not been compared with their progress in their courses, as only four supplied their grade point average. The timing of the first survey invitation could have been problematic, being near the end of the academic year; however, no-one opted for a later interview. The second invitation early in 2011 provided a further participation opportunity for others.

A future study, using a quantitative survey instrument informed by this small study, could investigate the university experience of a larger number of students in this age range, drawing in UniSA's metropolitan students. A comparison with older students internationally could then identify possible cultural differences.

Implications and conclusion

What can be learned from older students' perceptions that will enable their higher education experience to be optimised? At the end of 2009, of the total UniSA enrolment, there were fewer than 200 undergraduates aged 55 or over (the female to male ratio being approximately 2:1), not a large percentage of the 28,000 or so persons enrolled (cf. postgraduates: about 400 out of 9,000). However, when conditions are improved for one minority group, there are often benefits for others. These older students have given voice to factors that staff need to recognise: their complex lives with competing

priorities, areas where skills development may be required, and their need to be valued for what they can contribute.

Strategies adopted by lecturers to address expressed needs can involve being explicit in stating requirements, not taking for granted that supposedly everyday terms such as "tutorial" are understood by new students (of any age), and ensuring that ancillary knowledge is readily available (access to online and face-to-face support – psychosocial as well as academic, library resources, etc.). Some of the strategies suggested three decades ago by Knights and McDonald (1982) are still relevant: adequate advice prior to enrolment, study skills development as needed, and explicit guidance on using feedback on assignments. While such information is provided at orientation, and specific workshops may target students who have been away from study for long periods (e.g. UniSA's Early Preparation Program), many students (of any age) may need reminders and guidance towards user-friendly resources. Older new students may benefit from specific encouragement to attend orientation activities. Today some may need additional preparation for the information technology demands of university study, along with the general information provided to all students about using the university's particular online learning environment.

A 2008 publication, concentrating on enhancing adult motivation to learn, encourages teachers to build appropriate relationships and understand the variables rooted in ageing and culture (Wlodkowski, cited by Findsen & Formosa, 2011). Continuing professional development for university teachers can help them create inclusive learning contexts. Instead of seeking to assimilate students to some supposed "mainstream student" identity, students should be integrated into a learning environment that values their particular contributions, and where there is a meaningful teacher–student dialogue. While this appears to be happening in many cases, some lecturers may need persuasion to respond thus to diversity.

Not only can students in their later years succeed at university, it is imperative, as a matter of social justice and enabling people to reach their potential as individuals and as responsible citizens, that their

inclusion be facilitated, assuming that they have the ability and the inclination. Opportunities are lost if universities ignore this market, as Findsen and Formosa (2011: 24) point out.

Once older students decide to embark on university studies, their retention can be assisted by heeding the issues raised by our participants, particularly with regard to challenges and difficulties. A study of students entering UniSA by various alternative entry pathways (Ramsay, Tranter, Sumner & Barrett, 1996) found that the factors that were considered most important in influencing withdrawal by students aged over 50 were employment and health, followed by personal decisions; hence, flexible responses to such issues could influence students' retention, even given the more flexible opportunities now available with blended online and face-to-face learning. A Queensland study of mature age students identified adjustment difficulties for commencing undergraduate students aged over 45, and included recommendations for raising staff awareness and timing support offerings (Tones, Fraser, Elder & White, 2009).

The Bradley Review stressed the need for 'resilient, informed, adaptable and confident' citizens, developed by 'a strong education system designed to ensure genuine opportunity for all to reach their full potential and to continue to improve their knowledge and capacities throughout their lives' (DEEWR, 2008:1). Steps taken to address the challenges faced by some older students and by those teaching them may serve to provide a more inclusive learning environment for other non-traditional students. The resulting diversity of ages, backgrounds and experience within a learning environment can be enriching for all, not only the chronologically gifted.

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Appendix: Online questionnaire

Questionnaire for older UniSA students (55 and over)

1. When did you first enrol in your current university program?
2. Have you completed other university qualifications? (If yes, you may like to include how many years ago this was, and in what area of study.)
3. Have you started other university studies, but not completed them?
4. Do you have any comments to make on your earlier experience as a student, or, on the other hand, why you did not study at university in earlier years?
5. As a student who is (presumably) older than many of the students in your class/es, can you comment on:
   a. advantages of your greater life experience
   b. challenges that you face
   c. things that you are able to contribute to class discussions
   d. how other students relate to you
   e. how teaching staff relate to you
   f. how administrative staff relate to you
   g. how interested you are in the extracurricular activities available at university
6. What is your main motivation for studying?
7. Are there other activities/facilities that you would like to see provided at university?
8. Is there other support that you need – physical, psychological, study skills, other?
9. Would you advise others of your age group to consider undertaking study at university?
10. For you personally, what is/are the best thing/s about being a university student?

11. Are there negatives for you in being a university student?
12. If you are studying externally, do you have any additional comments to make on the suitability of that mode for you?

Profile of participant:

Female/Male

Metropolitan / rural area / regional town

Age group: 55-60 61-65 66-70 71 and older

Year of current university program

Study mode: Internal External Mixed mode

Student status: Full-time Part-time

If part-time, how many courses are you studying/have you studied this Study Period?

Grade Point Average (optional)

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Ready for action and civic engagement: Resilient third age women learners in rural Australia

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This paper discusses the power of local and experiential knowledge, civic engagement and social transformation on rural third age women's learning. My passion for learning reflects the methodological stance of heuristic inquiry, which requires the researcher to have a passionate interest in the phenomena under investigation and in this case, includes my tacit knowledge as a third age learner, a former farming partner and a long term resident of the region. Our two informal conversations about their midlife learning gave the six purposively selected women aged 58-70 the opportunity to reflect on their learning autobiographies as co-researchers. In their midlife, the women had the freedom and determination to change directions and the generative passions to remain useful, to give something back to their communities and to make them a better place for their retirement years and future generations. They emerged from the relative obscurity of the backrooms, kitchens and traditional supportive roles as farmer's

wives and mothers to become community activists, leaders and change agents who transformed their small service communities into thriving, vibrant, 'can do' societies better able to cope with the political, social, economic and environmental changes prevailing in regional Australia since the 1990s. They built new networks within the community and with the wider world and used their local knowledge and personal experiences to develop appropriate strategies for community renewal, which exposed them to diverse experiences, new knowledge and different ways of doing things. Unexpectedly they flourished and experienced personal development, growth and a transformation of the self as a blooming and fruition with the maturation of their potential.

Keywords: *third age learning, community engagement, rural women, informal learning, personal transformation*

The rural downturn in the 1990s was an invitation to action for some rural third age women living in the Lower Eyre Peninsula (LEP), South Australia to engage with their communities in new ways. Traditionally, rural women have contributed significantly to community wellbeing and the provision of services (Alston, 1995b:81, Teather, 1998) and in midlife, their third age, their civic engagement and sense of generativity are powerful motivations for learning. Their learning is driven by their need to be generative, to enrich their communities and to make them more viable and sustainable for future generation. They learn from each other, through new experiences and different ways of doing things. Thus, their civic engagement, generativity and third age learning are interconnected and interdependent. This paper explores the links between civic engagement and the third age learning of a small group of rural women of action who were personally transformed in the process of transforming their communities.

In this project, I defined the third age for women as the midlife period beginning during their 50s, when their children are independent and the women have the flexibility, freedom and time to develop new

interests and new roles and build new independent identities. The third age is a transition stage of active learning and social engagement that may last two, three or even four decades due to individual's increased longevity and better health. Despite the low numbers and specific regional focus, the findings are more recognisable in many Australian rural communities and women's midlife learning and personal development in these situations.

The research described in this paper is contextual and thus I begin by describing the historical and environmental background, rural midlife women and their third age learning. I then introduce the methodology and methods I found most effective to research one's own small community before discussing the results of the research and drawing conclusions.

Historical context

The Lower Eyre Peninsula is a reliable dry land farming region of South Australia producing primarily cereal grains, canola, wool and meat. It is officially classed as remote with the small service town of Cummins (district population of under 5000) and Tumby Bay (2500 people) providing basic educational and health services. Port Lincoln, at the southern extremity of the peninsula is the largest town of about 14,000; it is a major grain and fishing port 280 km west of Adelaide but 649 kilometres by road. In 1991, the Adelaide *Advertiser* identified Tumby Bay as a 'town waiting to die' (Jeffreys and Munn, 1996), but many other small rural communities throughout Australia were under similar threat.

Globalisation, climate change and recession in the early 1990s devastated many rural communities which struggled to cope with ageing and declining populations, business closures, the withdrawal of services and increased poverty, poorer health and higher rates of suicide and domestic violence (Cheshire and Lawrence, 2005:437,441, Tonts and Haslam-McKenzie, 2005:192-193). Rather than equity provisions to address long-standing problems, governments endorsed competitiveness, self-reliance and local entrepreneurship with the underlying agenda of efficiency and increased production at minimal

cost (Pini and Brown, 2004:169). They encouraged local leadership, promoted locally initiated revitalisation strategies and community participation in local decision making with limited government intervention (Tonts and Haslam-McKenzie, 2005:197-198). Instead of one size fits all, the economic rationalist policies provided rural people with the opportunity to take greater control of their futures and use their local and personal knowledge to devise the most appropriate strategies based on local resources and needs.

As in the past, rural women picked up the slack and filled in to provide the necessary family and social support services for their ageing populations (Jennings and Stehlik, 2000:67, Alston, 2006:170). But this time they wanted more and emerged from the backrooms and kitchens as community activists and change agents (O'Toole and Macgarvey, 2003:173). They realised that they needed to become more proactive to improve social wellbeing and to reverse the community's sense of inequity, economic decline and loss. With the support and encouragement of their partners, they assumed leadership and administrative positions in local government, on community boards and community development committees that were previously held by men.

Rural midlife women

Rural women I have known tend to be passionate about their communities since their families have a generational attachment to the land and the community where they and/or their partners and children were born, went to school, work and plan to live out their lives. They prioritise their family and community and are often described as the lynch pins for the family enterprise and rural communities (Alston, 1998:28, Brandth, 2002:184, Pini, 2002:344). Since the populations are small, volunteers provide most of the essential social and emergency services and caring for the young, aged and infirm (Alston, 1995a:528). Consequently, rural communities are rich in generative activities that provide opportunities for learning and personal development. However, third age rural women need to be creative and imaginative to design a more meaningful and fulfilling life within the limits of their environment, that will take them into

their old age and satisfy their desire to remain useful, to make a difference and to give something back.

Rural women are as diverse as any other group and their distinctive activities, identities, skills and knowledge defy normal categorisation (Grace and Lennie, 1998:351). With no children to care for, the midlife is the end of an era and an opportunity for new beginnings. Thus, their third age can be a dynamic period with more time, freedom and flexibility to develop new interests, new roles and a new midlife identity independent of their relationships. It is an important transitional period, a turning point (Helson, 1997:33, Wahl and Kruse, 2005:30) which, for women involves the merging of the quest for identity and generativity as they recreate and rediscover the self within by examining their motivations, goals and concerns that give their life meaning (Dittmann-Kohli, 2005:330). This midlife awakening of the self stimulates their sense of individuation, agency, introspection, personal integrity and an urge to realise unfulfilled potential in the second half of life (Helson, 1997:32, Dittmann-Kohli, 2005:331-332). Generativity involves integrating agency and midlife achievements with the desire to be needed, to take care of and to nurture (DörnerMickler and Staudinger, 2005:298). These are powerful motivations for further learning. For the women who respond to the challenges, their third age can be the prime of life, a blossoming, a coming to maturity, of personal fulfilment and reaching the peak of their influence on society (Lachman, 2004:322).

Third age learning

In mature adulthood, often the goal of third age people is existential learning, concerned with the meaning of life, via everyday experiences, through being-in-the-world and engaging with others. Thus, experience is a practical, participative and reflexive form of learning how to live that broadly involves the affective, imaginal, conceptual and practical modes as a person flexibly seeks to do, to move and to achieve something (Alheit and Dausien, 2002:15-16). In their search for meaning, the third age individual integrates their inner and outer selves with their experiences and increases their self-knowledge to create a new third age identity (Tennant and Pogson,

1995:118, Alheit and Dausien, 2002:11). They believe they are capable of learning deeply and competently; that they have another chance to achieve long held ambitions, past dreams and to make up for missed opportunities that were not available when they were younger. Thus, the third age is an opportunity for personal growth and creativity to discover the inner and more complete self and the acquisition of wisdom (Dittmann-Kohli and Jopp, 2007:270-271).

Learning is fundamental to existence, a vital element of being and becoming and the driving force of personal change, transformation and growth (Illeris, 2003, Dittmann-Kohli and Jopp, 2007:270). The midlife individual develops a new consciousness of self, their lives and their world by cultivating their personal power and social effectiveness and seeking new ways of living to balance the complex and often conflicting demands placed on them. The physical and inner self are enriched; they experience more profoundly and feel more fulfilled and live better and deeper lives (Jarvis, 2006:6-7). Furthermore, continuous learning is pivotal to the third age; it nourishes the brain, keeps the mind active and provides new challenges and social opportunities.

Over the years, rural women acquire their knowledge of farming, place and people via the lived experience of being in the body and being in the world that inextricably links bodies, language and social history (VarelaThompson and Rosch, 1993:149). Since rural communities are a rich source of informal and non-formal learning (Schubert, 2005:229), they learn tacitly and implicitly by doing and through their feelings, emotions and bodily senses in social interactions with others. Thus, their local and personal knowledge is accumulated through the assimilation of the many unconscious, ineffable, unspecifiable and unidentifiable tiny features of the lived experience (Polanyi, 1969:134). They do not know what they know or how they know but regard it as common-sense.

The research

Five women, aged between 58 and 70, invited to participate in this study are involved at different levels in transforming their small LEP

communities into more resilient societies better able to cope with the significant social, economic, political and environmental changes of the past two decades. The women are of Anglo-Australian heritage and are or were involved in farming; two have always lived in the region, two arrived as young adults and another in midlife. Three had three years of secondary school, one completed four years and one has university qualifications.

The research questions applicable to this paper are:

- What is distinctive about rural women of action and their experiences?
- What is significant about their learning?
- What was the learning that transformed the women?
- How were they transformed?

As I have lived in the region for most of my adult life, I approached the women as a learner to create a more equal relationship. I understood rural people's wariness of academics and I stressed my connections to the region as a farming partner and a long term resident with generational links to build trust and establish a continuing relationship. I wanted to know how they adjusted to the lifestyle changes in their middle years, their third age; how they adapted to the social and economic changes in rural life; and what they learned through their community activism. Initially, the women were not aware of their personal development and learning which was mainly experiential, informal, unintentional and unconscious through the tacit dimension via everyday experiences and being engaged with the world.

In two extended conversations around a series of questions we reflected on our mutual experiences as rural women, our midlife experiences and our third age learning until each topic was exhausted. Throughout the whole research process, I was mindful of my informants' privacy and confidentiality in a close knit region where people make connections through mutual acquaintances. Moreover, I provided copies of our conversation transcripts and my

interpretations of their experiences and encouraged them to edit theirs for misinterpretations or misunderstandings.

Since the women are prominent in their rural communities and are well known throughout the region, I chose Moustakas' (1990) heuristic inquiry to overcome the ethical issues of confidentiality, privacy and concerns of power. Moreover, an essential methodological feature of heuristic inquiry is the researcher's passionate interest in the phenomenon (Moustakas, 1990) which in this instance values my tacit knowledge and lifetime connections with the region as a farming partner, resident and third age learner. The two semi-formal research conversations gave us the opportunity to reflect on our mutual biographies as co-researchers by spiralling inwards towards self-knowledge, self-awareness and wisdom. While transcribing the taped conversations I realised it was the beginning of my personal transformation as I explored and re-interpreted my own experiences and constructs while learning about the women and their experiences. The narratives were analysed to create a series of individual and composite portraits through continuous heuristic cycles of engagement, immersion, incubation, illumination and explication using the heuristic concepts of self-dialogue, intuition, indwelling and focusing within the experiencer's internal frame of reference. Thus, by mining my own experiences and tacit knowledge, the heuristic methods enabled me enter a particular space and engage with the women and their experiences in a fundamental way to create new knowledge and develop a series of heuristic portraits. They were then used to compile a creative synthesis of rural women's third age learning and community activism to elicit a deeper understanding of the essences and significance of the phenomenon (Moustakas, 1990).

Third age learning and community engagement

This research supports the finding that community engagement is an important social and cultural activity for rural women and can contribute to their personal development and build connections with the region and people. Although rural communities have fewer formal learning resources, they are rich in opportunities for informal and non-formal learning in family and community interactions (Schubert,

2005:229). For women, the various church auxiliaries and the CWA (Country Women's Association) mentor younger members who serve an apprenticeship to the current leaders in a community of practice without anyone recognising it as learning and teaching. Martha, aged 70 and the community historian, describes her community learning thus:

> *I'm not consciously aware of learning. We've been putting on concerts, shows and performances for 15 years and we planned, we programmed, we practised and we learned to speak and sing. We nominated someone as Citizen of the Year; we applied for government grants; we do these things for the community and it's all learning.*
>
> *We've a new president and secretary this year and I've written down everything for them and said, 'this goes in the minute book, and that's all the stuff we've done. You add what you've done and next year we'll allocate it to others.' It's the organisation they can't get their heads around. We've done our 10 years plus and it's time for a change. I couldn't do it anymore, but I was willing to help.*

The 1990s economic and environmental downturn provided abundant generative opportunities for the co-researchers, Martha, Louise, Marian, Helen and Esther who needed more from life and felt they had more to offer. They found new ways to engage with their communities and their actions are subtly transforming gender roles in rural society. The women joined new organisations and committees to focus on local issues to find solutions to reverse community sentiment. Without the competition of established hierarchies, the new organisations provided opportunities for the emergence of third age women as leaders and decision makers with alternative visions for the future that were more inclusive, creative, democratic, collaborative and nurturing (O'Toole and Macgarvey, 2003:183).

Each community developed different strategies based on their local resources, but the first projects were relatively small as the women learned to write grant applications and then to raise funds to match government funds. Tumby Bay focused on its position on the coast,

promoted itself as a holiday and retirement destination and developed community-wide strategies to combat the high suicide levels. When they had sufficient funds, the Cummins and District Enterprise Committee employed a co-coordinator as the central contact person and conducted a feasibility study to encourage wider participation and determine community priorities. They opened a small caravan park to provide short-term accommodation and staged the Kalamazoo around the town's rail line through the main street. Their revival of historical hand operated rail cart (kalamazoo) racing, keg rolling and other traditional sports raised money and brought the community together. According to Louise, who describes herself as a 'professional volunteer,' it gave the community a new sense of identity.

> *When we first started, people were asking what was the point and why have a Kalamazoo, but I believe it has given them a sense of pride and achievement especially as we succeeded and won a few awards. The doubters have become smaller and we've become bigger.*

The women's activism provided significant learning opportunities as they established new businesses and developed new networks within the community and with governments, industry and service providers. In the process, they became more innovative 'can do' societies that inadvertently created learning communities, open to change and new ideas. Louise remembered the effects of successfully establishing a Community Bank which put over one million dollars back into the region in its first ten years.

> *I really enjoy that things are changing, we are doing things; things are happening. If people see the need for change and if somebody is prepared to take the lead and push the idea then usually others come in to help and be supportive. The bank was set up and to me that really stopped the rot. It stopped the community feeling things were taken out of their hands. The day we opened the bank one of the older blokes said, 'We'll show them, we'll show them that we can do it ourselves; if they can't do it here, we can do it.'*

Some rural women joined the local bank board where they learned about corporate governance, management, media presentations, legal responsibilities and working with a large national business. The Enterprise Committee acted as an umbrella organisation and established a number of smaller community businesses run by volunteers, such as a second hand shop, a bookshop and a craft shop that exposed more women to small business management and provided additional funds to improve the town's amenities and services. The wider community formed enthusiastic sub-committees to plan, organise, manage and cater for two-day musical festivals and air shows that attracted visitors from beyond the region. These events gave them project management experience, expanded their horizons and established networks within the wider community and diverse industries throughout the region and interstate.

Recent government plans to change the status of rural hospitals united their communities and the people argued forcefully against plans to cut services. Third age women assumed leadership roles on new health advisory councils to negotiate with government and to identify sustainable services that would ensure their health services and practitioners remained within the community. Helen argued:

> *Our communities have to be very proactive and when the government comes up with a plan, we are going to have to come up with an alternative plan and negotiate. The services that eventually come out of health units will only be as strong as the health advisory councils. If we're weak or don't have the numbers to fight, we'll lose our services by natural attrition.*

Rural communities make significant contribution to their medical services raising funds for new medical equipment, provide professional rooms, staff accommodation and refurbish the hospital buildings. Recently, the women of action were pushing to upgrade their medical facilities to meet accreditation standards so that they continue to attract quality professionals and services. Helen was asked to take on the leadership role and she enjoyed the discussions and learned more of the lives of other less fortunate people in the region. First, she had to sell the concept to the community:

> *The odd one rang up and we had a really good debate and I really enjoyed that but one woman was really hostile and I talked to her. I went to her community, spoke at a meeting and said, 'Now come to the hospital and I'll give you a cook's tour and afternoon tea.' They were so supportive afterwards. Yes, so it was a matter of selling.*

The committee had to research the services people needed, the levels of disadvantage and to develop a concept of a building to meet their future needs before applying for a substantial government grant.

> *We had a huge application and when that fell over people feared that the minister could close the acute care of the hospital. They've all come to the conclusion now that if they have to contribute a little bit in rates over a 20 year period, it's really quite minor.*

The recovery process following the devastating 2005 Wangary bushfire provided different learning opportunities for Marian. It was an extreme catastrophe for the region with nine deaths, over 90 homes and 145,000 hectares of farmland and bush destroyed in about three hours. Marian took responsibility for managing the services and distributing donated goods and money to people who lost everything. She found that many were prepared to help, but was frustrated that few wanted the responsibility of making decisions.

> *I learned leadership skills and to deal with people in tricky situations, with traumas. We became a counselling service and I sometimes think we did a better job counselling than those trained to do it. We were prepared to listen and quite a few people said it was easier to see us, have a cup of coffee, someone to have a cuddle with and a cry on a shoulder.*
>
> *I learned a lot of managerial skills and I set up systems to record the volunteers and clients. I think the hardest thing is to make volunteers feel wanted, to keep the peace and they received support and someone to talk to, because they were finding it difficult too.*

As that role ended, Marian had the confidence and skills to nominate for a national leadership position in an international women's service

organisation. In addition, she continues to be active in local affairs promoting community development and regards her midlife move to the region as one of her best decisions.

Esther's interest in counselling, aged and palliative care provided learning and generative opportunities. She takes great pride that the elderly enjoy a high quality of life and described her co-ordination of the monthly Friday afternoon social events that bring the community to the elderly and infirm as:

> *… a great privilege … The kids from school entertain, we sing and local people come to talk about their travels or interests. We get wonderful publicity … so the older people out there know what's on for them. I'm good on local knowledge and I have the connections and know somebody who might have ideas or help. It also helps me to relate to people.*
>
> *There's a lot of training that comes with that. It seems as you give, so you receive. The hospital staff invited me to do a dementia course with them and we were the first in the state to pass.*

Having a strong sense of generativity also means it is hard to let things go. Louise spoke about her fear of things falling down again and the need to trust others. Marian chatted about preparing for generational change:

> *Letting go is a challenge and encouraging other people to take over. Although you've got a vision of how you want it done, you've got to have faith in others to carry on. Succession planning and getting the next generation involved is a real worry. I think that's really important.*

Martha discovered a new passion as local historian in the mid-1980s when she inherited a collection of local historical material, which she augmented and published as part of the celebrations of 150 years of white settlement in South Australia.

> *The best thing happened in 1986, when South Australia celebrated their jubilee. Every little community did their history; all the oldies were still alive and they could remember the early*

1900s. It has been wonderful for historians and locals to do this history.

Until then, she knew nothing except memories of her father's humorous bed-time stories of his early farming experiences. When she joined the local creative writing group, she discovered that her creative forte was recording those stories for other children. She continues to build the historical collection at the local library for future generations and encourages others to write their histories and stories of earlier times. Martha wants to connect the children with the community elders and to develop their pride in their community to increase their sense of belonging and ownership. She believes 'It's our grassroots, somehow we are connected. The kids have to learn to be ambassadors. They have to know about the town.'

Discussion

The 1990s rural recession was an incentive to action and encouraged some rural third age women to engage with their communities in new ways. They realised that change had to come from within if their communities were to survive and, for the first time, the men moved aside and encouraged women to assume the important leadership and decision making roles that are transforming their communities. The women broadened their experiences and developed new networks within the community, with governments, service providers, business and policy makers, which exposed them to new ideas, new skills and different ways of thinking and doing. While their focus was on transforming their communities into more open, flexible and sustainable societies, they developed new independent identities, experienced personal growth and fulfilment with the maturation of their potential.

According to Dittmann-Kohli (2005:330), generativity and selfhood are the goals of the third age. Thus, the third age women of action combined their strong generative impulses and their passion for community to learn, to grow and to flourish. Their community activity increased their self-confidence and sense of efficacy while broadening their skills and knowledge implicitly and tacitly. In addition, they

developed a deeper self-understanding and a critical awareness of how their actions and leadership had contributed to social cohesion, community viability and sustainability. Although these third age rural women were motivated by both internal and external factors, this research supports Stewart and Ostrove's (1998:1192) suggestion that midlife women who respond to externally imposed challenges experience a deeper sense of competence, personal growth and identity development that enhances their potential and contributes to their personal transformation.

The third age women who sought leadership positions to express their agency and generativity as community movers and shakers, activists and change agents required substantial learning and personal change. As some of the first women in the region to assume leadership roles that previously were the realm of men, they intuitively felt they had more to give; they wanted to make a difference and had a desire to leave their mark on the community in which they lived. They used their local and personal knowledge to improve community well-being, to increase prosperity and their achievements and community awards empowered them. They learn implicitly, tacitly, incidentally and experientially through the body, mind and emotions from being in the lived world, engaging with others and making a difference. Their mindfulness and inner explorations increased and deepened their awareness of the self and their world and alerted them to the learning that is essential to their personal growth, fulfilment and self-realisation. In the process, they discovered previously hidden or undeveloped abilities and submerged aspects of the self through their inner resources of discernment, imagination and creativity. Furthermore, they developed a new, more authentic and satisfying midlife identity to take them into old age.

The women see themselves as having grown into their potential with a wider range of skills and newly discovered qualities and strengths. Instead of being radically transformed, their community engagement changed their expectations of themselves and their lives as they discovered new ways of thinking and experiencing the world. For some, it was like unlocking a door to hidden rooms within the self to discover new capacities and aptitudes that facilitated the

emergence of a more complete, authentic and fulfilled self (Lear, 2011:233). Finally, for these women, the third age is the prime of life, a blossoming, a coming to maturity and reaching the peak of their influence on society (Lear, 2011:230).

They no longer see themselves as third age women, simply wives, mothers and partners but have new opportunities for a different future that offers more challenges and possibilities. They have a new confidence, realise that they can affect outcomes and influence the lives of the wider community; they can make a difference and leave their world a better place to live.

Conclusions

As Foley (1999:12) argues, heuristic study is most powerful when it is both social and contextual. Hence, this heuristic project provides a rich portrayal of how rural third age women of action make sense of their social, economic and political situation and act upon it to regain a sense of control over their future and to overcome the strong sense of disconnection and alienation from mainstream power. The contextual literature review on rural third age women, their third age learning and the rural situation presents the explanatory connections between the micro activity and the broader cultural, political and economic processes.

Civic engagement is an important activity for rural women; it enables them to develop connections and bonds them to the place they call home. Moreover, it is a valuable social, cultural and learning resource for their personal growth and enables them to develop more meaningful, satisfying and fulfilling lives in their third age. Rural women's community activism gives their life purpose by gratifying their generative needs to remain useful, to make a difference and to ensure their communities are more sustainable, viable and vibrant places, better able to cope with change. The women who participated in this study provide insight into the ways midlife adults and rural people learn through experience, community participation and social interaction. Much of their learning is unconscious, unintentional, informal, experiential and practical through their tacit dimensions,

via their senses, bodies and emotions through engagement in everyday communal activities and with the wider world. Their reflections on their biographies and recent experiences during the research conversations gave the co-researchers their first opportunity to recognise the significance and value of their learning. In retrospect, they could see how far they had come and how they had changed, developed and grown as authors of their own futures through their community engagement.

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About the author

Dr Glenna Lear *began her third age career with a degree in adult and vocational education as an external student. She explored the learning experiences of older postgraduate students for her Honours and completed her PhD thesis on the third age learning of rural women in 2011. She lives in regional South Australia, is a volunteer with the Centre for Regional Engagement, University of South Australia, and continues her research into third age learning, rural women and their communities.*

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Learning a new lifestyle

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This paper explores the role of innovation in overcoming the challenges and negotiations within the 'lifestyle migration' or sea/tree change of working people, to places rich in nature but 'lean' in industry. It focusses on how they overcome primarily economic challenges in the process of negotiating a new life.

The paper is founded upon a qualitative study in conjunction with relevant literature and theoretical analysis. Participants stemmed from diverse socio-economic positions and represented both the coastal and hinterland townships within the study site. The study stems from the need to understand the difficulties within the lifestyle migration phenomenon, where anecdotally approximately two thirds of working aged migrants within the study site 'fail' to sustain their relocation for at least five years.

This paper attempts to expose how the minority of those who attempt the transition have managed to survive. The research employs a unique approach in exploring the relationship between adult education theories of reflexive identity and innovation, as

well as educational perspectives of self-efficacy and emotional intelligence. The paper suggests that reflexivity with external factors positions the process of seachange among working people as a creative act where lifestyle migrants need to demonstrate creativity in order to survive.

Keywords: *innovation, lifestyle migration, identity, regional Australia*

Introduction

This paper explores 'sea/tree change' or 'lifestyle migration' among working people as a transitional learning process, triggered by necessity, through navigating a new life. It is based upon a narrative study where the development of innovation was found to prove key in determining the 'success' of the migration, as qualified by its duration of at least five years.

The study was inspired by the thousands of city workers who attempt to leave urban society for a 'lifestyle migration' to the study site, the Noosa biosphere in Queensland, Australia, each year (ABS 2006 a-e; 2008). It aims to answer their question: How do I get out of here and survive? The narratives suggest that the draw of the natural environment is of primary significance for these urban refugees, along with a desire to establish a sense of control over their own lives through a stronger reliance on values other than materialism. As such, this paper explores the challenges of lifestyle migrants – physically, economically and socially – how they were overcome and how the new environment impacts upon their self-reinvention. I argue that such a reflexive construction encourages a pioneering spirit among these transitioners who, mostly through necessity, adopt a self-reliant approach towards work and community involvement. The process positions these transitioners as 'small town pioneers', embracing the wild frontier without the familiar structures of urban society, changing work and developing skill sets in order to survive.

Creativity and innovation are crucial in their problem-solving endeavour.

Creativity is referred to in this paper as a process of becoming, sharing commonality with work on adult learning as a process of becoming (Beckett 2001; Solomon 2005); and lying in opposition to the historical state of being (Deleuze 1990a, 1990b). Innovation theory (ANTA 2001) is employed to illustrate processes within this overarching development. In this context, creativity and personal change are linked to broader social change.

Setting, methods and ethical considerations

The site for this study was the Noosa biosphere region, encompassing coastal and hinterland towns. The research involved 22 participants, ranging in occupation, who were aged between 25-54; who had moved to the site at least five years prior from a city background; and who were working, thus excluding those not needing or wanting employment. Participants were recruited through media exposure inviting community to participate. A lack of response from the trades, representing the largest sector in the region, was apparent and so I undertook social networking to attract these participants.

Participants were asked to tell their story of moving to the site and were then asked a standard set of prompts around the two key questions – How do lifestyle migrants reinvent themselves? What factors contribute towards a sustainable relocation? Interviews were approximately two hours each to sufficiently incorporate a comprehensive exploration within the study itself, as opposed to relying on comparative data (Yates 2003). These stories revealed pertinent information that would not have been satisfactorily retrieved through a question and answer format. A process of narrative analysis was undertaken, involving a three level operation (Walker 2008):

Level 1 – description, transcription, cross reference with participants;
Level 2 – analysis between participants to generate themes, and their points of tension;

> Level 3 – critical and cultural analysis through identifying standard and divergent meanings; explore connections to broader cultural, historical, and political influences.

Particular consideration was given to the integrity of the questioning to ensure that it was not influenced by contentious subject matter, such as council amalgamation. However such themes were incorporated once raised. The interviewer's personal interests were clearly separated from content expressed. Further, conformity was adhered to through meticulous transcription of the recorded narratives by the researcher, the cross-referencing of content and context and through providing participants with the opportunity to review narratives and narrative summaries. Changes incorporating participants' edits where then made. Approximately half the participants chose to be identified and half chose confidentiality.

On negotiating self

Through this study, lifestyle migration is positioned as an act of becoming, where innovation is integral and promoted through the actions involved in the renegotiation of a new life. In line with this, self-efficacy and emotional intelligence were found to be crucial in managing the challenges of the negotiation, where successfully pioneering the path in learning a new lifestyle occurs in tandem with the development of these skills.

The fate of lifestyle migrants typically involved a change in status and work, in relocating from an urban context. Losing one's former reputation as a 'professional' through lack of opportunity is one example of this. Therefore reflexive identity development (Chappell et al 2003) in the context of lifestyle migration is central to the phenomenon. As such, notions of authenticity (Hoey 2005; Osbaldiston 2010) and the pursuit of an ideal life are pertinent in relation to change which occurs in response to external factors.

Literature on lifestyle migration and voluntary simplicity (Hoey 2005; Benson and O'Reilly 2009; Osbaldiston 2010; Ragusa 2010; Hamilton and Mail 2003; Chhetri et al 2009) indicates that relocation impacts upon the individual reflexively, through the ensuing social,

economic and cultural challenges of the move, as opposed to providing only a premise for *symbolic* recreation, as emphasised by Benson and O'Reilly (2009). These urban refugees are led to change perspectives, question the dominance of power structures and challenge assumptions based upon the mechanical moves they make in the aim of survival. This process reflects key aspects of innovation methodology (de Bono 1982, 1995), as applied to the becoming involved in learning a new lifestyle. Accordingly, the narratives indicated a significant emphasis on self-change through reflexive construction as imperative for sustaining the relocation, where only two narratives indicated minimal change.

Georgsdottir and Getz (2004) describe the value of flexibility in the becoming process, where the ability to switch between conceptual frameworks demonstrates a capacity for innovation and in the context of this study, a capacity for creative problem solving. Mostert suggests that our everyday environment is held responsible for facilitating or blocking flexibility where the ability to perceive coincidence, for example, is a result of flexibility of mind (2007). Moultrie et al (2007) support the notion that the contextual climate has a direct influence over a person's willingness to express their creativity through qualities of challenge, freedom, dynamism/liveliness, trust/openness, idea time, playfulness/humour, conflicts, idea support, debate and risk-taking and where the physical environment can also act as a catalyst for creativity via visual stimuli, social and cultural activity and branding. There is a rich correlation between these dimensions and ensuing themes within the narratives. Bandura discusses perceived efficacy in a similar context where individuals influence the types of environments they choose and the direction of their personal development where: 'Social influences operating in selected environments continue to promote certain competencies, values and interests…' (2001:10). Therefore a breaking away of such aspects towards an ideal, as in lifestyle migration, enables new aspirations to develop, playing an important role in becoming someone new.

The instability of society, particularly through the work force (Wren 2008), encourages innovation as a problem-solving endeavour. However, risk adversity is often the outcome when the challenges

prove too great, as experienced in some narratives. Bandura's exploration of self-efficacy (1977) is instrumental in this equation in the context of risk management. The development of self-efficacy was highly recognisable in the majority of narratives through innovation and adaptation to a new social infrastructure, involving new ways of being and relating, particularly around sustainable employment.

Finally, Daniel Goleman's theory of emotional intelligence supports the significance of self-efficacy within self-awareness (Goleman et al 2006), where a highly self-aware person will stay focused on their direction and so can refuse a tempting financial offer for instance that is not aligned with their principles or long-term goals. One could therefore argue that lifestyle migrants are indeed self-aware at the time of making their departure from the city, which has ceased to satisfy their goals. By contrast, a person lacking self-awareness will make decisions which create 'inner turmoil by treading on buried values' (1998:96), as many narratives revealed was apparent prior to their departure from city life. One participant confirmed that her stress emanated from the thought of having to leave the area, rather than her battle to survive, which remained consistent. Her response is based upon the natural environment and the small community as primary values over materialism. In fact, the value driven motivation of lifestyle migrants often bring external turmoil, heightening risk in preference over a scenario of sameness.

Innovation in action

As Deleuze and Guattari wrote in *A Thousand Plateaus: Capitalism and Schizophrenia* (1987:249), 'The self is only a threshold, a door, a becoming between two multiplicities.' As such, the door to a new state of being opened for participants who were able to reinvent themselves and survive through the problem-solving of challenges. The study identified change agents through the material world in relation to money, work and personal goals. Some of these also intercept the cultural and social realms. All narratives indicated innovation to varying degrees as a requirement for sustaining the relocation. This of course is only relevant where the values inciting the relocation remain

unchanged, rather than other factors prompting the cessation of the lifestyle migration experience.

Innovation is the process of coming up with new ideas or new uses for old ideas. To be innovative the ideas must add value (ANTA 2001b). Therefore in the context of how the survivors manage to survive, innovation is explored in relation to problem-solving challenges. As participant Lew suggested of such challenges, 'What you find is that a clear majority of the demographic is more comfortable in that less lawful less constructed social fabric. It either attracts people because it's exciting or people choose to stay away because it's too exciting for them'.

The narratives reveal that the meaning of success is closely aligned to innovation in respect to the development of self-efficacy. While Gayne proposed that the condensation of a broad range of people in a small geographic area allows more exposure to influences in other businesses and market places encourages innovation, he says he hasn't changed through his relocation, rather that his business has changed to reflect him. His understanding of success has changed through managing the business on his own terms rather than for a large corporation, which is contingent on the small town context. As a 'high flyer' his greatest risk in leaving 'the big end of town' was personal reputation where he was:

> ...scared I would get off the professional merry go round. Everyone said once you reach CEO, MD status you're at the pinnacle of you career – you fall off that ladder and it's very difficult to climb back up, and they said once you reach 35 you're obsolete. I was coming up to 40 and I was just paranoid... I'm more focused now on doing things from my perspective and I now know that I don't need the corporate dollar to become successful. All money does is it reduces the time frame of development. So from a very fundamental base of cash I can still feel a success, I just have to recalibrate the timeframe... Success at one stage was about the bottom line and now it's very much about the journey with the team. I've changed my perspective on success because I've been the architect, I've taken control from inception so I've been able to apply my collective knowledge of different parts of businesses I've worked

> on and modify them, based on a business that's evolving, yet the principles are very similar.'

In Donna's experience, innovation is strongly linked to simplicity lifestyle where creativity is developed through necessity: 'I've definitely become more creative since moving here. Since I haven't had much money … This wouldn't have happened in Brisbane because I'd get caught up in my own world I don't know, I seem to have more time here…' Essentially Donna created opportunities for herself in response to struggling with a cash flow problem since purchasing her tourism business shortly after her move, 'It's like a survival instinct… it's something I've discovered about myself… I bought the house and decided now I have to make it work.' At the time of interview she mentioned six business activities that she was either currently undertaking or preparing for.

Andrew is one participant who acknowledged his existing capacity for innovation, rather than suggesting that relocation challenges inspired its development: 'Well you arrive, things get difficult and you innovate. I've always done that…' He was one of two participants who demonstrated minimal change through his relocation.

Below, I have attempted to formulate innovation from participant narratives. These are based upon the whole narrative rather than only the extracts shown. The italicised words represent some of the 30 key themes that were identified in the study.

Alexander was inspired to start a business after numerous unanswered job applications. He was fuelled by his passion for the sustainability industry and the natural environment and he developed flexibility in adapting to the culture of the place and by accepting unstable work patterns:

> The lack of opportunity here just pushed me along to make it happen… I would never have done that in Germany and I don't really know what's different but the feeling is different. In Germany everything is more structured … Innovation is in the way we have to be flexible because you can get stubborn in saying 'I am' a whatever they used to be, 'and that's what I want to be here', and

> they can't let go of that. So they either have to leave or commute to Brisbane for work…

From his narrative, *innovation* is shown through following his *passion* for the n*atural environment*, made possible in the absence of *power structures*, where *flexibility* and *self-efficacy* support the development of *goals*, along with *reflection* time to assess ideas.

Angus believes the cultural context of small town living is one of economic risk, comparative to a city. His decision to venture away from his building career and into retail was a response to the continual problems of financial instability in the trades. He believes he has become more innovative since relocating and says, 'I have become, I suppose, reactive to my environment.' His *flexibility* and growing *self-efficacy* allowed him to take *risks* in response to a changing environment, tempered through *reflection* afforded by the *natural environment*.

Anita started a swim school in the hinterland, which grew from a position of economic problem-solving due to a lack of facilities, while leveraging off the community spirit in her town. On a broader scale she discussed innovation in the context of having pioneered a new life, coming from a fast-paced television career in London. She identified structure and fear of lack of structure as inhibitory to innovation. Her story maps growing self-efficacy and demonstrates flexibility towards innovation.

> We get lots of our English friends and family coming over to stay. They've all realized… when we first came out they thought why are they doing this, they both had great jobs in London and they came all the way out here. When they visit us they say 'Oh now I can see why you did this, this is amazing'. We say 'you can do it too' and they say 'no we couldn't do that'. They won't let themselves because they need to feel people on top of them and around them yet they love it when they come out to see us. But I think it freaks them out because of the lack of structure. We've created our own structure and that's made us more independent. I guess they work to create a sense of identity whereas we, I don't know, we, I guess we're doing everything for our kids and for ourselves.'

Her capacity to *innovate* involves *reflection* facilitated by the *natural environment* and absence of *power structures* where her *self-efficacy* and *flexibility* promote the development of *goals* in response to need.

Chris allows his problem solving along with his passion to lead his business innovations, from his first ice cream van along the river to his dog training, which includes stand up paddle boarding lessons for canines: 'Certainly surf, lifestyle, beach, my hobbies and my pleasures turn into business…' He is a calculated *risk* taker and seeks the risk versus reward within that equation, admitting that it doesn't always 'add up' however, he views losses as learning opportunities. His *flexibility* to react to competition creates opportunity, where passion and *self-efficacy* are prime *motivators*. He considers that lifestyle migrants need to create opportunities for themselves because of the competition and lack of opportunities existing.

This self-reliant approach is also reflected in John's narrative and propels his innovation. He calls himself 'pig headed' and has established highly successful automotive businesses through 'gut instinct', potentially involving a strong capacity for *risk* assessment and *self-efficacy* along with an ability to *plan* and develop *goals*. In addition, his *flexibility* is shown in the way he re-contextualises *skills*: 'As a builder you would learn how to build shit and you realise there's a sequence of events. So you can take that level that might have nothing to do with building, and go into something else. A lot of people don't understand that.'

Duncan innovated through difficulty in securing a regular income stream and looked to retraining in response. He relocated as a computer animator with existing clients until the work slowed down and then retrained in adapting his 3D animation skills to fit the largest industry sector in the area, building and construction. That started to dissipate and he is now training in building design.

> I guess it's a little to do with being creative, when I was trying to find a way to make it work… we decided to stay here and to change our field because there's really nothing for animation up here…

He also discussed the distraction of consumer culture and says he experiences more mental clarity since his move. Therefore Duncan's approach to *innovation* comprises *flexibility* in problem solving, where his *self-efficacy* nurtures the development of *goals* and where *reflection* is promoted through limited *novelty* or distractions.

Retraining has also reshaped Geoff, dramatically. When he befell a nightmare scenario through unemployment and ensuing clinical depression in his first years, he pursued creative yearnings in photography, away from his background in retail because: 'I always wanted to do it and I suppose I figured that life couldn't get much worse.' He settled in the study site because of the attributes of natural environment, being highly sensitive to 'visual pollution' and noise of the city. He has since remodelled his life and equates success with happiness:

> It nearly went terribly wrong, as wrong as it could. I suppose on the other side I've turned my life into something new. So my world grew incredibly small here and then I had to expand again and so now I'm on this course of really extending myself professionally. That's the path I'm on now and it's on my own terms that's why I can do it.

Geoff could not have anticipated that one day he would be teaching photography and echoes Alexander's comment in saying: 'Certainly up here you can't set your mind on, I want to do one thing, you have to keep doing things until you work out what's going to succeed.' For Geoff, *innovation* occurs through *flexibility* towards problem solving in absence of external *stressors*, where his *self-efficacy* nurtures the realisation of *goals*.

Karen's view on success stems from her former corporate career and her own successful business which ensued through relocation. She places her current status and self-esteem above her stellar career in Sydney, 'because we created it ourselves'. She believes that being away from "group think" encourages innovation and says it's not hard to be creative when you're out of that 'rat race' and sitting in traffic.

> That whole group think, stress, inhibits creative thinking. To be innovative I think you have to have reflection time and you have to be away from the group think so if you're away from group think you're mind is either blank or it comes up with something different. And it's nice for it to be blank for a little while, but then in that reflection period when it is blank some other little things start popping into your head and then it's, 'Oh I wonder if…' and it's asking that question that's important. Sometimes it's not going to work but you have to have confidence behind the ideas because sometimes your innovation is going to achieve the goals far better than the current norm.

Innovation for Karen comes through *flexibility* to re-contextualise concepts, away from *stressors* and *power structures*, where *reflection* is enhanced by the *natural environment*, along with the *self-efficacy* to develop *goals*.

Steve made dramatic professional changes, however his personal values hadn't changed, having initially relocated as 'Mr Mum' with his family while his wife pursued an executive career. He suggests he was never concerned about finding work because of his broad experience in service work and he was unconcerned about career status where, '… if I were tempted to go back to a city I'd still keep the same work/life balance because success is not about money to me it's about being happy'. However, for Steve, due to the career collapse of his wife and the need to earn more income, relocation resulted in professional development rather than limitation as he transformed from part-time retail to managing his own business in services office suites. They saw a niche opportunity and took the risk, metaphorically pioneering the territory rather than 'fitting in' to an established structure, creating something new.

> I had no idea where to start, what to do, I hadn't spoken to a professional in seven years so I was out of the loop big time… And we had our rent to pay. I knew after the first year the pressure would be less, that's when we started to get staff on.

While Steve says that living in the area has not changed him, his business has and arguably developed through lack of employment

options and a need to find an alternative path. He also discussed making specific use of nature for developing ideas. For Steve, *innovation* is seen through his capacity for *flexibility* and *self-efficacy* to respond to necessity via the development of *goals*, enhanced through *reflection* afforded by the *natural environment*.

Lew and Tamsin each created a place-related career for themselves through their relocation. Their careers grew from the seeds of their new lifestyles. Lew was 'having a full life' as a young bricklayer who relocated with his wife when 'a lot people turned up coincidentally at around the same age at the same time [and] there were no services, there was nothing. There was a hall'. The situation required community input, where Lew began to demonstrate leadership through the P&C, the swim club, barn raising events for a community house and a number of other examples:

> This passion became my work… When I was elected [to council] I thought what do you do? And I worked out it was up to me so I then applied all those things I unconsciously learnt from being part of all those associations and working with great people to make stuff happen, and that's what I see my role is in council so I've learnt some great lessons from living in the hills. I've weaved my way around family and work and personal development in a sort of casual way but they cross over so much it's hard to separate them.

For Lew, *innovation* has developed through his *flexibility* and *self-efficacy* to re-contextualise concepts and utilize resources in response to necessity and *passionate* pursuits.

Finally, Tamsin said she wrote herself into the place, 'After I finished working at Maroochy Council I started the PhD about place, having come from being a real city girl. So I really wrote myself into Noosa and created a place for myself through that study, and it's ongoing in the writing I do for journals'. She has experienced cash-flow difficulties since relocating and discussed the risk of becoming unemployable back in the city. Reputation is significant to Tamsin in exchange for the career status she left behind where her efforts with community and cultural development are a response to this.

Her approach to *innovation* is similar to that of Lew, through the *flexibility* and *self-efficacy* to respond to necessity and engage *passionate* pursuits, while extending boundaries towards the development of *goals*.

The explorations and creative responses to the limited economy of the area shown in this section are hallmarks of survival capability in the lifestyle migration quest, demonstrating innovation and self-efficacy among other key capabilities.

Conclusion

The study found that more than half of the participants underwent notable identity development, in reaction to external influences, in addition to six who experienced self-directed change as a primary influence; and two who experienced minimal change. This emphasises the power of the lifestyle migration journey as a transformative undertaking through its reflexive action, rather than lifestyle migration as a purely symbolic context for self-change. However, even within the self-change group, the role of innovation in resolving challenge is suggested as a highly significant contribution to the sustainability of relocation among participants who survive the five year mark.

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Literacy strategies used by adults with intellectual disability in negotiating their everyday community environments

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This paper presents the findings from one part of a participatory research investigation about the literacy strategies used by three young adults with intellectual disability in their everyday community environments. Using data collected through video recording, prompting and think-alouds, information was collected about the range of literacy events that the research partners engaged with and the strategies that they used to negotiate these events. Findings revealed that these young adults engage in literacy in their everyday lives using literacy strategies that are multiple and varied and which draw on learned school-based and context specific strategies. Visual texts enabled more effective construction of meaning. Multiple context specific examples are provided to create a snapshot of how these young adults use literacy in their everyday community environments that broadens our knowledge

and understanding of the types of literacy events and strategies that they engage with.

Keywords: *literacy, intellectual disability, community, strategies.*

Introduction

Being literate is key to being a valued and contributing member in a Western society (Katims, 2000; Lundberg & Reichenberg, 2013; Street, 2011). The definition of literacy however, is contentious with questions of who may be literate and calls to broaden conceptualisations of what constitutes literacy and for whom (Keefe & Copeland, 2011; Kliewer, Biklen & Kasa-Hendrickson, 2006; Morgan, Cuskelly & Moni, 2011). Social theories of literacy have legitimated the socially embedded, context specific nature of literacies (e.g., Gee, 1991; Street, 1997), and findings from a range of ethnographic studies in different contexts have broadened conceptualisations about what constitutes literacy to include multiple forms (e.g. Chitrakar, 2000; Maddox, 2005; Papen, 2005a).

Yet despite literacy being recognised as a social practice (Street, 2003), these views have failed to make substantial inroads into the ways literacy is perceived and investigated with individuals with intellectual disability. School-based conceptualisations continue to dominate pedagogical practices of literacy learning, with value placed on school-based literacy skill acquisition, which leads to everyday literacy practices being marginalised (Katims, 2000; Maddox, 2008; Papen, 2005b; Street, 2011) and overlooked in investigations with adults with intellectual disability.

Conceptualisations of everyday literacies emanated from Street's (2003) model of literacy in which literacy is socially embedded and learning particular literacies is dependent upon the specific contexts in which they are learned. In this model, everyday literacy constitutes multiple practices that people use as they go about their day-to-day lives in the community, for example reading timetables, writing

and sending Christmas cards, navigating information boards, and following directions.

Research into understanding what constitutes literacy from a social perspective enables researchers to move away from more traditional, psychometric studies of literacy acquisition to adopt a situated view of the social practices of literacy in different contexts, and the meanings that literacy has in the lives of those who use it (e.g. Papen, 2005b; Smith, 2005; Taylor, 2006). From this perspective, qualitative investigations of literacy, in which participants have the opportunity to tell their own stories, in their own ways, within familiar contexts, are undertaken. However, there are limited studies of the situated literacies of adults with intellectual disability and how these intersect with those strategies taught and used in school (e.g. Smith, 2005; Taylor, 2006; Wilson & Hunter, 2010). These studies have found variance between school-based and everyday literacy strategies and have identified difficulties in transference of literacy use across different literacy domains for typically developing adolescents and at-risk learners (e.g. Alvermann, 2001; Smith, 2005). However, there is limited information about whether and how adults with intellectual disability use specific literacy strategies to enable the negotiation of literacy in everyday community environments. Thus, little is known about the ways adults with intellectual disability use literacy in social, local contexts, which is where literacy is most likely to be used by them.

Investigating how people with intellectual disability construct literacy in different contexts will add to our understanding of the role of literacy in the lives of these individuals together with enablers of, and barriers to, the accessibility of literacy and thus how to more effectively enhance their access and participation in a range of social and community spaces and events.

This paper reports part of a PhD investigation of the everyday literacy use of individuals with intellectual disability using a participatory approach to research. The key questions guiding the research were:

- What does literacy look like for young adults with intellectual disability in their everyday environments?

- What literacy strategies do they draw on in negotiating these environments ?

Method

This project used a participatory research design (see e.g. McClimens, 2004; Walmsley, 2004) in which the young adults were research partners rather than objects of study. This design involves a collaboration in which individuals with intellectual disability are included in the research process so that the research is undertaken *with* and not *on* them (Walmsley, 2004). This design was considered an appropriate methodology through which to explore the research partners' literacy use as they negotiated their everyday environments. While the direct experiences, views, thoughts and, in this case, literate processes, of the research partners are integral to the research partnership, participatory research allows for collaboration with a person without intellectual disability to provide direction (Alm, 2010; Bigby & Frawley, 2010), and in this case, skill development. As collaborative research partners it was essential to develop their knowledge and skills in research, prior to data collection. This occurred via a collaboratively developed research training program that was accomplished through the application of action research cycles.

Action research is a form of inquiry that acknowledges the realities of the dynamic nature of teaching and learning, while providing a scaffold from which knowledge and understanding may be developed to effect change (Hien, 2009). It enables the implementation of strategies or actions, as well as amendments, based upon observation and critical reflection of those actions, through the progression of a series of successive, recurring cycles (Smith, Bratini, Chambers, Jensen, & Romero, 2010).

Research partners (participants)

The research partners were three young adults with intellectual disability - Emma, Joseph and Lauren. Emma and Lauren chose to use their real names, while Joseph chose a pseudonym. Emma and Joseph have Down syndrome. Lauren has an intellectual disability for

which the cause is unknown. Through the use of levelling procedures (see Morgan & Moni, 2008) the research partners' approximate reading ages ranged from eight to ten years. These young adults had left school 10, 12 and 4 years ago, respectively. All of the research partners lived at home with their parents where they all enjoyed listening to music, watching DVDs, cooking, and surfing the internet. During the course of the project, all of the partners were active, social members of their communities participating in organised sporting activities such as horse eventing (Joseph), gymnastics (Emma and Lauren), tennis (Emma), and community classes including art (Emma), scrapbooking (Lauren) and dance (Emma, Joseph and Lauren). Emma, Joseph and Lauren attended a post-school program two days per week comprising literacy, technology, art, and community activities. Emma and Joseph undertook paid employment, while Lauren was employed in a voluntary capacity.

Procedure

As this project used participatory research it was essential to develop the research partners' knowledge and skills in research, prior to data collection. To this end, three action research cycles were undertaken with each cycle comprising two parts. The first constituted teaching and learning about research and what the term *literacy* encompassed. The second part transitioned into the field to collaboratively investigate the research partners' use of literacy in their everyday lives, the effectiveness of the strategies they used and any barriers they experienced in negotiating literacy.

Emma began in Cycle 1 and was the first research partner. The principal researcher (Michelle) worked with her to develop her understanding and skills related to research. Together they collected data relevant to Emma's everyday literacy. Emma's role changed to teacher in Cycle 2, when Joseph joined the project. Emma, supported by Michelle, passed on her research knowledge and skills to Joseph and then the three researchers collected data about Joseph's everyday literacy. When Lauren joined the project (Cycle 3), Emma took on the role of research director and Joseph that of teacher. In the final cycle, the three research partners collected data pertaining to Lauren.

A transition to the field followed the teaching and learning phases of the project. During this phase, the partners trialled modelled data collection methods in a familiar environment before going into the field. This enabled the partners to gain confidence in collecting data and allowed for problem solving prior to entering the field. During these trials it was determined that the most effective approach for collecting data was participant observation where the literacy events were videoed while the literacy user adopted a think-aloud protocol to talk about what s/he was doing and thinking (Wong, 1997). Question and think-aloud prompt cards were collaboratively developed. They comprised prompts such as "tell me what you are looking at. What can you see?" "What are you doing?" "How are you doing it?" "What did you do first?" These assisted the partners to talk about what they were doing, how they were using literacy and to tell their literacy stories.

Data collection

Prior to entering the field to collect data about their literacy in community environments, the partners selected a range of field sites they frequented. These included a local lookout with a café, planetarium, botanical gardens, a retail venue and a library. Emma and Joseph were also observed extracting information from a bus timetable, and Emma withdrew cash from a money kiosk. Each literacy event was filmed and think-alouds and prompt cards were used to support the collection of data at each site.

Table 1 shows the data sources in terms of the literacy events associated with each site. From this Table it can be seen that the partners engaged in a diverse range of literacy events including, for example, viewing displays and pictures; reading a diversity of environmental print and information via a range of mediums; navigating directories, on-screen instructions, and store layouts; ordering and purchasing, and using a computer catalogue. Each partner engaged in multiple events, at different times and contexts, which drew on the five literacy elements of viewing, reading, writing (including creating), listening and speaking (ACARA, n.d.). Table 1 also shows diversity in the complexity of events in which the partners engaged in their everyday lives. These included viewing through a

telescope and viewing displays to reading and using environmental print and transport timetables.

Table 1: Field sites and corresponding literacy events

Local lookout (All)	**Cafés (All)**	**Planetarium (All)**	**Botanical gardens (All)**
Viewing through a telescope	Reading a menu billboard	Viewing photos, models, displays	Navigating using sign posts, markers
Reading tourist information boards	Reading an à la carte menu	Reading information plaques	Reading plant labels, information plaques
	Ordering, purchasing		Reading information boards

Retail stores (All)	**Library (All)**	**Bus transit terminal (Emma & Joseph)**	**Money kiosk (Emma)**
Viewing items	Navigating sections	Reading timetables	Reading on-screen instructions
Reading, using signs and environmental print	Locating specific books	Reading digital time displays	Navigating screens
Locating specific items	Using a computerised catalogue (Joseph)	Viewing and reading numbers, destinations on buses	Following instructions
Ordering, purchasing	Reading signs		Making selections
Navigating shopping centres using directories, information boards and signage	Reading titles		Inputting monetary amount figures
	Viewing pictures and displays		
	Using an automated scanner to borrow books		

Data analysis

Each week, the collected data were collaboratively analysed using the video footage of each literacy event together with the *Combined Literacy Scaffold* (White & Morgan, 2012) that was based around the research questions and developed by Michelle and Emma. For example, the research team used this scaffold to identify themes. Similar responses became themes that were identified and refined further. The themes were then clarified to ensure accuracy of representation. Explicit instruction, modelling, support and repeated practice were provided so that, by the third cycle, the partners were able to use this scaffold and process to independently analyse the field data.

A range of measures was used in this project to ensure reliability, validity, and thus rigour in the research process. The issue of accurate representation of data was addressed through collaboration and shared research roles, through videoing all research sessions to enable repeated checking, transcribing data, and member checking. Ensuring accurate representation of data through the use of multiple methods enhanced the validity of the investigation, while varying the times and settings of observations and using a variety of data collection methods to facilitate triangulation, enhanced reliability of research findings (Lewis, 2009).

Results

Literacy elements

Of the five literacy elements, viewing and reading were used most by all of the partners, while writing was used least, and not at all by Lauren. All of the partners used viewing and reading in all of the sites visited, and in all of the literacy events, with the exception of ordering items and food which was done from memory where speaking and listening were used. Writing was used by Emma when withdrawing cash from a money kiosk. The on-screen instructions required her to type in a PIN number and amounts of money. Joseph used writing in the library when he used the computer catalogue to locate a sports' book. All of the partners had the opportunity to write in a visitor's

book at the botanical gardens, but all declined to do so. Apart from the writing events indicated above, opportunities for the partners to engage in writing in these local contexts were rare, and this might account for writing being the least used element.

The range of strategies used by the partners when negotiating literacy events in their everyday community environments is presented in the next section.

Strategies used for constructing meaning from everyday environments

These young adults engaged in multiple and varied literacy events with a diverse range of complexity. The analysis identified a range of strategies that the partners used in negotiating literacy in their everyday community environments. These are presented in the order in which the young adults used them to construct meaning.

Viewing pictures and reading main headings

When pictures or icons were present, all of the partners looked at the picture first before reading any written text. Then, typically, they looked at any headings or signage if these were available. The think-aloud excerpt in a music store highlights Emma's use of this strategy:

> Emma: Um, when I see all the CDs I always um, look at, I actually um look at the pictures (Emma looks at the CDs while she is talking)…
>
> Emma: (Points to the large label "ROCK & POP above the CDs) And I do actually read the signs, they tell me these CDs are Rock and Pop.
>
> Cycle 1 8-08-09

In the second cycle, during a visit to a café, Joseph explained how he used the pictures on the menu to help him read and know what to order.

> Michelle: Okay Joseph, you're looking at a menu – so tell us what you're doing.

Joseph: I looking at the pictures first

Michelle: Okay, so you looked at the pictures first. What do the pictures help you with?

Joseph: I think the pictures, when I see the pictures I see the writing.

Cycle 2 17-04-10

When selecting a CD in a music store, Lauren also looked first at the pictures on the cover before reading the words.

Emma: Tell me what you're doing. Are you looking at the pictures or the words?

Lauren: On this CD, I am looking at the pictures of the people on the cover and then I look at the words on it and then I also I look at the words at the back, of the songs, the words of the songs.

Cycle 3 16-12-10

However, reading main headings in conjunction with viewing pictures did not always enable the partners to construct meaning, and in these situations the partners used prior knowledge to make links between the information being presented and what they already knew and understood.

Making links to prior knowledge

The partners used prior knowledge in situations when pictures were unfamiliar, or absent, and when they experienced difficulty in reading and understanding written text. For example, Emma used her prior knowledge about plants to determine what a bonsai was.

Michelle: Okay, we've got a sign on the wall. And what does that say Emma?

Emma: I think it's Bols… Bonsols House

Michelle explains that the word is Bonsai

Emma: Well actually, I do know what it means. It's actually a fake plant…

Some discussion follows of Emma's strategies for using pictures and headings from an information board about bonsais.

Michelle: Have they [pictures and headings] helped to tell you what a bonsai is?

Emma: Um yes

Michelle: So what do you think it is, based on the pictures and the headings?

Emma: It's actually a um… a cactus.

Michelle: Oh OK, so what is a cactus? What do you think a cactus is?

Emma: Well a cactus is not a real plant …um…

Michelle: OK so you're still thinking that a bonsai is a fake plant?

Emma: Yes

Cycle 1 25-07-09

This transcript shows that Emma's use of linking to prior knowledge in this context was an ineffective strategy to assist her to construct meaning from the written material on display. This may be attributed to her limited knowledge about cacti, together with difficulty in reading the information board.

Joseph accessed and activated his prior knowledge in the planetarium, attempting to make links between what he already knew about planets and the information that he was trying to extract from the displays.

Joseph (Looking at a photo of Venus and its moon): I looking at the two planets here, and about Venus, and the writing here, and I read it, I read the writing about Venus.

Michelle: And what does it tell you about Venus?

> Joseph: Ah, (Joseph begins reading from the end of the first line) clouds of sel-fabric and also an-ter-mos-phere of carbon dis-oxide and greenhouse reflect [sic: *Clouds of Sulphuric acid and a dense atmosphere of carbon dioxide produce a greenhouse effect*]…
>
> Michelle: Do you know what a lot of those words are? What they mean?
>
> Joseph: Um yes
>
> Michelle: (Points to *Sulphuric acid*) This one, what does this mean?
>
> Joseph: Sulf-afric
>
> Michelle: What is that?
>
> Joseph: It's like, it's a sort of fabric. It's like when you look at the two pictures it's like the fabric of the two planets…

Joseph's inability to accurately recognise and read the difficult vocabulary led to inaccurate word substitution. Links to prior knowledge were, therefore, also inaccurate and, in this instance, linking to prior knowledge was an ineffective strategy.

While the partners attempted to make links between the information being presented and what they already knew, when written text was too difficult to read and understand, construction of meaning was limited because of incomplete knowledge, and inaccurate word substitution, and so use of this strategy was ineffective.

Reading signs

There were myriad signs in the settings the partners chose. For example, in shopping centres, the partners were aware of signage and often made use of it to locate specific departments, and items.

> Emma explained the signage in her place of employment, a large clothing store.
>
> Emma: There's boys wear, babies wear, men's wear… (Emma ticks these off on her fingers)

Michelle: And how do you know which department is which?

Emma: Well, they all have signs up (Emma points to the large signs suspended from the ceiling in different areas)

Cycle 1 8-08-09

While this indicated accessibility of this signage, other sites revealed that some signs were inaccessible to the partners because of the choice of font and style being used. For example:

Michelle: What do you do when you come to a bookstore Emma?

Emma: I look for all the signs to tell me what books I can buy

Inside the store, Emma looks at a sign that reads – RECOMMENDED STORIES – the font is ornate and each letter abuts the next without spacing:

Emma: Oh, I can't understand that (points to the sign) I'm looking at this

Michelle: This one here? So you've looked at it but you haven't understood it so what do you do?

Emma: Um, I won't read it

Cycle 1 8-08-09

Joseph also made use of signage in a bookshop to help him to locate specific collections and genres.

Michelle: What sort of books are these?

Joseph; Um, they are non-fiction (looks at the sign above the section)

Michelle: And how do you know that?

Joseph: I think non-fiction means biographies (this sign is visible above the shelf)

Michelle: Okay, and was there some sign that told you that it was a non-fiction section?

Joseph: Um, up here

Cycle 2 1-05-10

Although Joseph used signs to locate specific genres, he experienced difficulty when he did not understand terms such as 'Paranormal Fiction' and 'Reference'. Joseph read some titles of the books in the section to determine what 'Paranormal' meant. He looked at the pictures and then used his prior knowledge of the horror genre to link to the unfamiliar word:

Joseph: Paranormal fiction

Michelle: Oh, what does that mean?

Joseph: I don't know

Michelle: How would you find out what Paranormal fiction meant? What would you do?

Joseph: I think, I don't know… I think it's like um (Joseph looks at books in this section which were displayed with the covers facing out) I think it's horror

Michelle: And what makes you think that?

Joseph: Because of the titles here

Michelle: What sort of titles are you looking at here?

Joseph: There's vampires and scary ones (Joseph was looking at the pictures of ghouls on the covers)

However, Joseph did not always use this strategy effectively if there were no picture clues associated with the signs as indicated in the continuing transcript.

(Joseph walks past another sign)

Joseph: Reference

Michelle: What's reference? What sorts of books are in the reference section? (Most of the books in this section were placed

on the shelves with only the spines facing out. Those that had the covers facing out were without pictures).

Joseph: I don't know (Joseph continues to walk on)

Michelle: So would you bother finding out? Or would you just read it and not worry?

Joseph: I just not worry…

Cycle 2 1-05-10

The absence of signs, and in some situations the partners' difficulty in using the signage, led to the identification of another strategy that the partners' used when locating items, categorised by the researcher as random perusal.

Random perusal

All three partners adopted the strategy of wandering through sites, choosing items at random to inspect to see if they met their needs. This strategy of random perusal was most evident in the library, although it was also observed in other locations such as the botanical gardens, the planetarium and various shops. Both Emma and Joseph had some explicit knowledge about how to use the search tools available in the library, but chose not to employ them. For example:

Michelle: So what book are you looking for at the moment?

Emma: Um, travelling books

Michelle: Travelling books, so how do you know where to go to get a travelling book?

Emma: If I go through, well I look through the catalogue to show me where it is

Michelle: …So would you like to look through the catalogue, or would you like to keep doing what you're doing?

Emma: I'll just keep going

Emma resumes wandering past aisles and up and down them. She looks around, then at random, slides books halfway off the shelf, looks at the cover and then slides them back and moves on.

Scrolling and reading random words

Reading random words was observed in conjunction with scrolling when constructing meaning from specific texts such as menus, display plaques, information boards and timetables. For example, in a site visit to a café, Emma selected one of the menu boards at random, then used her finger to scroll down the listed menu until she came upon an item that she recognised. She then read the main heading that was typed in bold font. If it was something she recognised or wanted, she read the sub-headings or information about the item.

Scrolling is an overt indicator of directionality in reading and a strategy that was used by all of the partners to locate familiar vocabulary when attempting to read various literacy artefacts at different sites. While Emma and Joseph used scrolling effectively when reading bus timetables displayed in a transit terminal, in other contexts, the partners used the strategy of directionality haphazardly. This resulted in the partners reading isolated words from random places within the text and affected their ability to gain understanding of the text as a whole. Joseph, for example, after reading main headings, would 'pick out' key words at random from the texts. He did not use conventional directionality of top to bottom, left to right, but started at random places within the text and then read isolated words. For example, in the planetarium, after reading the heading, Joseph began reading the eighth word of the first line followed by the fifth word of the next line (bold in the transcript).

The first paragraph of the text reads:

> *SATURN'S RINGS*
>
> *Saturn and its magnificent ring system change* ***orientation*** *as seen from NASAs Earth-orbiting* ***Hubble Space Telescope*** *during part of Saturn's 295-year journey around the Sun.*

Joseph points to the second line of text as he reads. He attempts to read the word orientation but then reads from the next line

Joseph: Hubble space telescope

Cycle 2 17-04-10

Readability statistics, calculated using the Flesch Reading Ease and the Flesch-Kincaid Grade Level (Kincaid, Fishburne, Rogers & Chissom, 1975) were applied to the passage above. These statistics generate an approximate readability, together with a school grade level of readability for the text concerned. The level of readability for this passage equated to a Flesch Kincaid Grade level of Grade 12. This was clearly well above the partners' approximate reading ages of Grade 3 to 5.

At the tourist information boards at the lookout, Lauren looked at the information in random order. She did not use top to bottom, left to right directionality, instead she looked randomly at various sections of information and then selected one to read. In the planetarium, Lauren was observed scrolling through one of the information plaques. She ran her finger underneath some lines of text in a general sweeping top to bottom, left to right direction, but beginning from the third line down. Like Joseph, Lauren also read some words at random from within the text.

Left to right, top to bottom and line-by-line directionality is the established reading strategy that is taught in schools in the western world. However, the analysis of observations indicated that for the partners, when text was at a level of difficulty above their comfortable reading level, conventional directionality was used haphazardly, or replaced with reading words at random. This was shown to adversely affect their ability to construct accurate meaning.

Phonological decoding

While phonological decoding skills were used by all of the partners, their use of this strategy was not often effective. For example, Lauren was observed using phonological decoding at the lookout information boards and also at the planetarium.

Emma: Do you want to read out something to us?

Lauren: Oh um, Australia's fist, first, Australia's first

She pauses for six seconds looking at the next word then attempts to decode the unknown word phonologically:

Lauren: Australia's first, oh, Australia's first you-ro-ah-na-no, blah

Lauren hangs her tongue out and looks at Joseph and shakes her head

Lauren: Blah, de-lah, (she skips this unknown word) transverse-re-or-err, blah I dunno what the word says. Trans something, I dunno, I can't understand what the word says

Cycle 3 12-12-10

While the partners displayed their knowledge of phonics and the mechanics of phonological decoding through the use of sound chunking (grouping chunks of sounds rather than sounding single letters), they were unable to make use of it to effectively blend and decode words. In other contexts, discrepancies between knowledge and skills affected their literacy practice.

Knowledge versus practice

There were instances during literacy events where the partners' knowledge of literacy behaviours was discussed but not observed in practice. For example, Emma was not observed using any form of alphabetical ordering or cataloguing system to locate a travel book in the library even though she knew the purpose of catalogues and numbers found on library books.

Michelle: I notice that you're looking down each aisle, what are you actually looking at?

Emma: I'm actually looking at all the numbers

Michelle: And what do the numbers tell you? What do they mean to you?

Emma: Um, …um, no the numbers tell me what the number of the book code

Cycle 1 8-08-09

Joseph also knew that libraries used alphabetising to order books. However, he was unaware of the structure of the library and the use of alphabetising in specific sections, and could not use this knowledge effectively in practice. Similarly, Lauren talked about how at the planetarium she always read the information under each display so that she knew what the image was about.

> Lauren: When I come here by myself I would probably look at this (points to the large image of planets) and read (points to the information plaque) what this is saying all about (sweeps her hands over the images) and what it's telling me, what these pictures are all about and what it's saying about the planets and stuff like that, yeah.

Cycle 3 14-12-10

Yet in practice, Lauren was not once observed reading any of the information plaques or scrutinising any of the images or displays beyond a glance. It was also found that while Joseph said he looked at and read the writing first, in practice he was observed looking at, and talking about the pictures before reading any text.

These examples of differences between what the partners knew and what they were able to do might emanate from learning traditional school-based literacy practices where reading text is seen as more important than looking at pictures. Their accounts might also indicate a desire for the partners to say what they thought Michelle wanted to hear, and what they knew to be valued as mature reading behaviours.

In these contexts the partners displayed partial knowledge and understanding of those behaviours typically found in proficient readers such as using conventions of print but were not always able to practise them.

Discussion

The aim of this investigation was to identify the kinds of literacy events that young adults with intellectual disability engaged in during

community activities, and the strategies they used to negotiate these events. This investigation provided a snapshot of the literacy use of three young adults with intellectual disability, revealing that they engaged with a range of literacy practices in a variety of community settings. They used a range of strategies and context specific tools to assist them in locating items and in the construction of meaning.

One of the key findings is that these three young adults with intellectual disability relied on the use of picture clues. In all literacy events, viewing pictures was the first strategy that they used to construct meaning. In contexts where written information was inaccessible to the partners, pictures were their sole source of information. Consequently, in the absence of written text, or when the partners experienced difficulty accessing it, they attempted to make links to their prior knowledge for the construction of meaning from visual text. However, this was not always accomplished successfully and thus their construction of meaning was not always accurate.

The analysis indicated that all of the partners used main headings and signs as a source of information and when available, matched these to the images. However, there was mixed success in the partners' use and construction of meaning from main headings. For example, in the botanical gardens none of the partners was able to make sense of the information provided on the information boards in the bonsai house. The partners were aware of, and used signage to follow directions, locate items, and determine the various sections of different settings. When environmental print was inaccessible, or the partners lacked strategies to make use of it effectively, they used random perusal. The literacy strategies used by all of the partners in their local libraries for example, highlight their use of random perusal to locate specific books. These findings also indicated a partial understanding of some of the library tools such as call numbers on books and the system of alphabetising, but limited abilities in using this knowledge as a strategy to find books.

Reading isolated words was used when the partners experienced difficulty accessing the signage and understanding the layout and organisation of other contexts. Here, limitations in knowledge and

reading skill, an incomplete understanding of the conventions of print and reading behaviour such as directionality and difficulties in applying written content to real life situations hindered comprehension

This investigation showed that the partners knew and used some school-based strategies in their everyday contexts, for example matching pictures to written text, reading main headings, making links to prior knowledge, and scrolling text from top to bottom and left to right. However, their use of these strategies was inconsistent and not always effective. Their use of directionality and scrolling on texts such as menus and bus timetables was more successful. However, it was also found that when a word was unfamiliar and difficult to read it was ignored, omitted, phonological decoding was attempted or a substitution was made.

In all instances where the partners decoded by sound chunking (grouping chunks of sounds rather than single letters) they had knowledge of the letter sounds but they were unable to connect the sound chunks to decode the words correctly. Thus, either substitutions were made, or the word was omitted from their reading. When the text was too difficult and phonological decoding was unsuccessful, the partners would stop reading and give up altogether. These findings identify limitations in the ability of these young adults to transfer school-based learning to everyday local contexts and support other research findings.

The issues raised in this study highlight the need for a social practices approach to literacy learning to enable these young people to be taught about their local communities and environments. School and post-school curriculums need to address topics that are of interest and relevance to their learners with intellectual disability in a way that is meaningful to them in their community life.

The implications of these findings are for educational programs and community programs to provide multiple and varied hands-on opportunities in ways that cater specifically for learners with intellectual disability to accommodate the different knowledge and

skills they have about literacy strategies (Alfassi, Weiss & Lifshitz, 2009).

Conclusion

The findings from this investigation have broadened our understanding about the literacy use of people with intellectual disability, and what constitutes literacy for them in their everyday environments. The study has provided evidence for the central role that literacy plays in the lives of these young adults revealing that literacy for these young adults is complex, multi-modal and challenging. Furthermore, important insights have been uncovered about the strategies that young adults possess and that they need to develop as they negotiate community environments independently. This investigation highlights the need for researchers to continue exploring the literate lives of people with intellectual disability so that conceptualisations of what constitutes literacy for this group are broadened, local everyday literacies are recognised as legitimate, and people with intellectual disability are valued as literate members of society.

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Tertiary study: Barriers and benefits for health and human services professionals

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Results from two 2012 surveys exploring the barriers and benefits of tertiary study for staff within the Tasmanian Department of Health and Human Services suggest that encouraging staff engagement with further study benefits both the individual and the organisation. Respondents reported improved job performance, increased self-esteem and motivation to learn. Barriers associated with limited time and competing demands impacted on staff ability to access information about study options. In this context, workplace and management support for study was identified as a crucial enabler.

The investigative process of this study has been made explicit in order to encourage replication by other researchers. This mixed-

methods research was informed by the 'three capitals' approach in order to examine the personal, social and economic benefits of learning. The relative weakness of benefits associated with social capital in the results reflects the experience of these part-time mature-age students employed in a professionally demanding sector.

Keywords: *adult learners; three capitals; tertiary study; health and human services; Tasmania*

Introduction

A significant international literature exists on the benefits of learning, both on its broad impact (Centre for Research on the Wider Benefits of Learning, 2012; Feinstein, Budge, Vorhaus, & Duckworth, 2008) and its specific impacts on work performance (Karakowsky & McBey, 1999; Ng & Feldman, 2009). Within Australia, the importance of life-long and life-wide learning is recognised in policy (Swan & Butler, 2012) and practice (Adult Learning Australia, 2013).

Australia continues to show an uneven record, however, in educational participation and attainment by adults, compared to other OECD nations (Vinson, 2009). Clearly, significant barriers to participation exist (Falasca, 2011; Lewis-Fitzgerald, 2005; O'Mahony & Sillitoe, 2001). The need for greater participation in higher education, in order to meet the increasing demand for a skilled and adaptable workforce, is a key strategic priority for national workforce development (Australian Workforce and Productivity Agency, 2013).

The need for on-going education is particularly significant in areas where occupational growth is projected to be strongest: in professional and managerial areas and in health and social services (Australian Workforce and Productivity Agency, 2013). This paper looks at attitudes to adult learning at tertiary level, by this group of professionals, in Tasmania. It uses the 'three capitals' approach (Schuller, Preston, Hammond, Brassett-Grundy, & Bynner, 2004) to

draw conclusions about the perceived barriers, enablers and benefits of further study for individual learners. Mature-age, part-time, higher education learners are a significant population group but very few studies have utilised the 'capitals' approach to understand their learning outcomes (Swain & Hammond, 2011).

While this article considers health professionals engaging in tertiary education, the implications of the study may be applied more widely. For this reason the method and process of the study has been made explicit and is replicable by other researchers. In this, and its explicit integration of quantitative and qualitative evidence, the work follows the methodology promoted by the three capitals approach (Hammond, 2005; Schuller, 2004a).

Developing a learning culture

The Department of Health and Human Services (DHHS) is the largest employer in Tasmania, with 11,500 paid employees (Department of Health and Human Services, 2012a). The DHHS provided over 1.5 million occasions of service in 2011-12 – the equivalent of three contacts with every individual in the state – and accounts for approximately one-third of Tasmanian Government expenditure (Parliament of Tasmania, 2012).

The DHHS supports a 'continuous improvement and learning culture' as one of its corporate values (Department of Health and Human Services, 2012c). One of five strategic directions involves 'enabling our workforce to be properly educated, trained and developed, motivated and appropriately supported to give of its best'(Department of Health and Human Services, 2012b).

It is only since the middle of 2010, however, that a range of leadership and management development programs have been established to support these directions. This includes a Development program for front-line, mid-level and aspiring managers; a Graduate Trainee program; and an Academic program developed in partnership with the University of Tasmania (UTAS) (Shannon & Burchill, 2013). A small Leadership and Management Development Unit (LAMDU) was

established to develop, deliver and evaluate these programs with a manager conjointly appointed and funded by DHHS and UTAS.

It was anticipated that there would be some overlap between these three programs, with Graduate Trainees attending the Development program and Development program participants moving into the Academic program over time. By 2012, however, it had become clear that a reasonably low proportion of participants in the Development program had continued on to the Academic program (22%): considerably less than first expected (Shannon, Van Dam, & Stokes, 2012).

The Academic program had been developed as a multi-disciplinary, multi-faculty, postgraduate course offering work-integrated learning within the health and human services sector (University of Tasmania, 2012). The initiative reflects the strategic partnership between DHHS and UTAS (Faculty of Health Science & Department of Health and Human Services, 2011) and had been expected to have broad appeal. It was decided that research being undertaken as part of a suite of LAMDU projects under approval from the Tasmania Social Sciences Human Research Ethics Committee would include an investigation into factors influencing the engagement with tertiary study by DHHS staff.

A preliminary look at barriers and enablers

In April 2012, LAMDU invited comments from DHHS staff on their perceptions about barriers and enablers to their postgraduate study. This on-line survey was a simple set of three questions and was advertised through the LAMDU newsletter. It attracted 25 respondents from a potential list of approximately 300 participants (8% response rate).

In response to the question ‘what are the biggest barriers to postgraduate study?’ Respondents suggested that ‘overwork’ within DHHS meant that there was little energy left for professional development outside of work hours. Study also clashed with other commitments (family, social, personal). Other barriers identified were the cost of study, lack of information about the relevance/value of

the courses on offer, and technical difficulties with the UTAS on-line learning system, including lack of easy accessibility to resources required for coursework. A preference for face-to-face contact and, for some, a lack of confidence was also cited. Finally, in spite of the stated corporate commitment to education and learning, many respondents believed that their direct managers were not interested in, and did not value, their commitment to further education.

In response to the question 'what kind of things would help you undertake postgraduate study?', most respondents listed enablers that were the opposite of the barriers listed. For example, many mentioned that they would like more resources to deal with their professional workload and prevent the exhaustion of overwork. New elements, such as access to a good mentor outside of the workplace, were cited by a number of respondents who felt they needed one-to-one, face-to-face support to get started.

Two comments provided stimulus for further investigation: "I would like more clarity of how study can/will be applied and/or add value to a real job and will it provide financial rewards as well as broadening my horizons" and "I can find the time and the money when I have the energy and motivation to apply and put in the effort required." In other words, if staff could see more clearly the benefits of academic study, they would overcome the barriers themselves.

As this required an 'outcomes' rather than 'process' approach, the project objective was redefined 'to identify and publicise the benefits DHHS staff have received from further study, in order to increase staff engagement'. An undergraduate researcher was engaged, through the UTAS Faculty of Business Corporate Internship Program, to progress this project in July 2012. Working closely with the LAMDU manager as co-researcher, the intern was able to take an academically rigorous approach, with some distance from LAMDU policy imperatives.

'Benefits of academic study' stage one: research design

The research was approached using project management methodology (Department of Premier and Cabinet, 2011) and was

divided into three stages: research design, data collection and analysis. The research design stage had three steps: conceptualisation, literature review and sampling strategy.

Table 1: Project stages and steps

Research Design	Data Collection	Analysis
•Conceptualization	•Survey Questionnaire	•Statistics Analysis
•Literature Review	•Participant Reflection	•Conceptual Analysis
•Sampling Strategy		•Research Report

Conceptualisation involved the development of a research design and schedule. This was informed by a literature review of the significant body of work from the collaboration between the United Kingdom Department for Children, Schools and Families and the Institute of Education, University of London (Centre for Research on the Wider Benefits of Learning, 2012). The research project was subsequently based on the 'triple capital' conceptual framework (Schuller, Preston, et al., 2004) associated with this work.

This framework applies the term 'capital' to *anything that can be thought of as an asset of some kind and/or yields some kind of return or added value*, with three distinctive forms of capital.

- **Identity** capital – characteristics that define an individual's outlook and self-image. This includes attitudes, values and self-esteem.
- **Social** capital – networks and norms which enable people to contribute effectively to common goals. This includes family, friends and civic engagement.
- **Human** capital – qualifications, knowledge and skills which enable individuals to function effectively in economic and social life (Schuller, Preston, et al., 2004).

This theoretical foundation allowed for the construction of a model with multiple sources of value and benefits to the individual. Increases in identity capital would result in improved self-esteem, a sense of being more able to manage change, having more control over life and general psychological health benefits. Increases in social

capital would result in enhanced workplace relationships, improved personal relationships, an increase in extra-curricular activities and wider social networks. Increases in human capital would result in improved job performance, increased job satisfaction, increased motivation to learn and increased pay/remuneration.

The literature review also influenced the methodology chosen for this research, the collection of primary data through quantitative and qualitative methods, and 'triangulation', i.e. multi-method verification of results (Jick, 1979). This mixed methods approach was already associated with the 'three capitals' research (Schuller, Hammond, & Preston, 2004) and demonstrated significant advantages when examining the outcomes of adult learning (Hammond, 2005).

Two types of quantitative questionnaire methods would be employed to collect the data. Quantitative multiple-choice questions ask respondents to choose from a group of fixed alternative, mutually exclusive items. This method was chosen because it is efficient at collecting large-scale data (Walter, 2009). Likert-type questions record how strongly a respondent agrees with a statement or item. This method was chosen as it yields interval rather than nominal data (Walter, 2009).

Findings from the literature review guided the development of the on-line survey for quantitative data collection. The first section of the survey design collected demographic and employment information about the respondents, while the second section analysed the respondents' experience of tertiary education, with four questions against each of the identity, social and human capitals. One-third of the questions were based on earlier quantitative research on the wider benefits of learning (Preston & Hammond, 2003). Other items were drawn from areas of interest associated with the each of the three capitals (Schuller, Hammond, et al., 2004).

Qualitative data collection is concerned with exploring understandings, meanings and interpretations (Walter, 2009). Qualitative methods were employed in this research to further substantiate the benefits experienced from returning to study. Some qualitative data would be received as free text within the on-line

survey and additional participant reflection would be captured through semi-structured questions sent out via email directly to participants in the quantitative survey who had provided an email address and indicated they were willing to discuss the issues further. It was anticipated that contacting participants directly via email, rather than arranging 'one on one' interviews, would be more convenient to participants and enable responses from rural and regional areas across Tasmania.

Studies have demonstrated that email responses provide the opportunity to collect in-depth data by allowing interviewees time to reflect (Stacey & Vincent, 2011). Furthermore, email responses have a faster and slightly higher response rate, with more complete answers given to open-ended questions (Stacey & Vincent, 2011).

The email would ask participants to reflect and comment upon some of the findings of the quantitative survey they had previously completed. The survey results were to be divided into categories based on the three capitals framework (Schuller, Preston, et al., 2004). By dividing the results into three sections, distribution and data collection was simplified. In addition, analysis of the data became more comprehensive as comparisons could more easily be drawn between the categories (Walter, 2010). By asking participants to interpret the results of the quantitative research it was anticipated that the benefits of study would be ultimately defined.

The sampling frame consisted of DHHS staff who had previously, or were currently, engaged in further study. The sampling strategy would use methods of non-probability sampling, such as purposive sampling and self-selective sampling.

'Benefits of academic study' stage two: data collection

In early August 2012, an on-line test survey was made available to a sample group of 350 DHHS staff who had participated in the Development program. Distribution was via an email from the Manager, LAMDU. Fifty responses were received (14% response rate) and, as a result, small changes were made to the survey: slightly

rewording two questions, to enhance clarity, and providing additional space for free text responses.

In mid-August, all DHHS staff were invited to participate in the survey via an advertisement in the LAMDU newsletter and on the DHHS intranet. Another 220 responses were received, making a total of 270 DHHS staff participating in the survey by the end of August (approximately 2.5% of all staff).

Participant reflection – or qualitative data – was collected through responses to an invitation to discuss the topic further by providing comment by email. The 62 participants who elected to discuss their return to study experience further were randomly divided into two groups of 21 and one group of 20. Following this groups were randomly assigned to a capital from Schuller's et al. (2004) framework. The first group of 21 participants were assigned to identity capital, the second group of 21 participants were assigned to social capital and the group of 20 participants were assigned to human capital. Each email presented a summary of the survey data around one of the three capitals and then asked "why do you think this is?", inviting a short paragraph response.

'Benefits of academic study' stage three: analysis

The third stage of analysis, involved descriptive statistical analysis of the quantitative data and conceptual analysis of the qualitative data. The research report would summarise these conclusions.

Respondent Profile

Almost 83% of respondents were female, which is a larger proportion than expected, although 75% of DHHS employees are women. DHHS is also an older workforce, with one-third of all employees aged in their fifties (Department of Health and Human Services, 2012a). The age profile of survey respondents was broadly similar to that of DHHS as a whole, with some under-sampling of staff aged in their twenties (-4%) and sixties (-6%) and some over-sampling of staff aged in their forties (+9%).

The professional skill mix of DHHS staff as reflected in the industrial Award structure, has 40% of staff under a general Health and Human Services Award. This includes most administrative, clerical and front-line management at service delivery level. Nursing and midwifery make up 36% of DHHS staff. Allied health professionals (12%), medical practitioners (7%) and ambulance officers 3% make up the next largest groupings (Department of Health and Human Services, 2012a). Survey respondents broadly reflected this profile, with some under-representation of administrative (-8%) and medical staff (-5%) and over-representation of nursing and midwifery (+10%).

Respondents were fairly evenly divided between those who had worked for DHHS between 1-5 years (28%), 6-10 years (26%), 11-20 years (21%) and 21-30 years (21%). Approximately 31% had participated in tertiary education only once (undergraduate degree), with 33% having participated twice and another 34% having participated three or more times.

Survey results

The assigned values from the Likert scale survey items were converted to a percentage value for the descriptive statistical report on the 'three capitals' and associated benefits. The rating averages are shown in Table 2 below.

Table 2: Percent rating average for each type of benefit, capital, ranked by rating average

Capital	**Benefit: *I believe that through tertiary education I have…***	**Rating Average (%)**
Human	Increased motivation to learn	81.8
Human	Improved job performance	81.0
Identity	Improved self-esteem	80.8
Identity	More able to manage change	77.0
Identity	*Total average*	*76.3*
Human	Increased job satisfaction	75.4
Human	*Total average*	*75.3*
Identity	Psychological health benefits	73.8

Identity	More control over my life	73.8
All	***Total average***	***73.5***
Social	Wider social networks	73.2
Social	Enhanced workplace relationships	70.8
Social	*Total average*	*68.8*
Social	Increased extra-curricular activities	68.2
Social	Improved personal relationships	63.2
Human	Increased pay/remuneration	63.0

Identity capital was rated as the highest overall capital benefit, scoring the highest rating average overall (76%), followed by human capital (75%) and social capital (69%).

The three individual benefits scoring the highest average ratings overall were:

- Increased motivation to learn (82%)
- Improved job performance (81%)
- Improved self-esteem (81%)

These were the only items to score more than 80% average rating.

The six individual benefits which scored in average ratings of more than 70% were:

- more able to manage change (77%)
- having increased job satisfaction (75%)
- psychological health benefits (74%)
- more control over life (74%)
- wider social networks (73%)
- enhanced workplace relationships (71%)

These are best seen as second-tier benefits.

The three individual benefits to score less than 70% average rating were:

- Increased extra-curricular activities (68%)

- Improved personal relationships (63%)
- Increased pay/remuneration (63%)

Less than half of all respondents reported accruing a benefit through further study within these categories.

Text responses

Qualitative data analysis can be understood as the range of processes and procedures in which qualitative data develops into a descriptive presentation, understanding or interpretation of the subject under investigation (Thomas, 2006). As qualitative data analysis can be complex it is important for researchers for follow a well-defined strategy (Attride-Stirling, 2001). The qualitative data analysis strategy employed was as follows:

1. Collate qualitative data
2. Immersion into the data
3. Thematic analysis
4. Code data into categories
5. Explore relationships between categories
6. Develop themes
7. Reflexivity

The researchers recognise the need for (7) reflexivity throughout the qualitative data analysis. Reflexivity can be understood as the awareness of the researcher of their impact on the research and research process (Attride-Stirling, 2001). In this sense, reflexivity must occur throughout the design, data collection and data analysis stages of research. Otherwise, the above data analysis strategy was carried out in a step-wise manner. The data was (1) collated by formatting responses into a word document. Responses were grouped into three sections, based on the three capitals, to ensure comprehensive data analysis. The researchers became familiar with the data (2) so that analytical depth would be reached (Walter, 2009) and themes would not be overlooked or forgotten. Thematic analysis (3) explores both predetermined themes as established by the researchers and emergent themes that appear within the

data (Walter, 2009). The researchers utilised thematic analysis to determine common themes from within the data. Themes that emerged from the data were colour coded into categories (4). Explicit and implicit coding methods were utilized throughout the conceptual analysis process.

In total eight different categories were derived from the qualitative interview data. These included; 'enjoyment', 'learning', 'benefit', 'knowledge', 'performance', 'managing change', 'confidence' and 'staff relations'. At this point step (5), explore relationships between categories, was undertaken so that (6) the development of themes could occur.

Of all the processes and procedures of the qualitative data analysis the development of themes was the most time consuming. The development of themes required moving beyond a description of a range of categories and shifting to an explanation or interpretation (Walter, 2009). During the conceptual analysis of the qualitative data, several key themes emerged:

- 'knowledge'
- 'performance'
- 'confidence'
- 'staff relations'

Increases in knowledge, confidence and work performance were seen as having increased through participation in study, while staff relations were seen as benefiting from those increases. Examples of this perspective include the statement by one respondent that "It made me a better mentor …". Another noted that "online study has enhanced my relationships with people in my workplace".

These benefits appeared frequently throughout the data. These are set out in Table 3.

Table 3: Appearances of key themes in the qualitative data

Theme	Number of Explicit Appearances	Number of Implicit Appearances	Total
Knowledge	6	4	10
Performance	7	2	9
Confidence	10	8	18
Staff Relations	10	5	15

Synthesis of results

Survey results showed a cluster of three benefits (increased extra-curricular activities, improved personal relationships and increased pay/remuneration) with low rating averages. They were a mix of social and human capital benefits and were explained by one respondent in the following terms: "I have twice started tertiary study recently. Both times I enjoyed it immensely but both times I had to withdraw from my course of study due to staff leaving the workplace and not being replaced, leaving me with too much work, at work, to continue studying." In other words, these benefits were contingent on the environment in which they could occur. This theme of 'over-work' was repeated by a number of respondents and revealed a negative side to the 'performance' theme.

Second-tier benefits, such as being more able to manage change, having increased job satisfaction, psychological health benefits, more control over life, wider social networks and enhanced workplace relationships, were somewhat more amenable to personal control. A respondent describes her experience: "A program of formal study requires careful planning and consideration at any time in your life – for me it was equally a challenge in my fifties as it was earlier in my career to balance postgraduate study commitments with work and family,. But I would do it all again and more for the enlightenment and empowerment that flows …" In these responses, the ability to 'juggle' had been achieved and mastery of performance was being exercised.

The top three benefits – improved job performance, improved self-esteem and increased motivation to learn – appear to form a 'virtuous circle' as they reinforced each other in participant experience. The two highest scoring elements, 'improved job performance' and 'increased motivation to learn' had average ratings of 81% and 82% respectively and were identified as a benefit by 86% and 85% of respondents. 'Improved self-esteem' was identified as a benefit by 79% of respondents and had an average rating of 81%. It was also had the greatest percent of 'strongly agree' responses (31%). Improved job performance had the highest level of 'agree' responses at 61%. These are examined in more detail below.

Benefit 1: Improved job performance

Improved job performance is a benefit associated with human capital (Schuller, Preston, et al., 2004). In addition to the strength of this element in the quantitative analysis, content analysis showed that this benefit appeared a total of nine separate times throughout the qualitative interview responses.

"[Further study] improved my job prospects and allowed me to gain employment in an area I had a great interest".

One explanation as to why returning to study improves job performance is that education develops deeper competence. By providing individuals with declarative and procedural knowledge the likeliness of them completing work tasks more successfully increases (Ng & Feldman, 2009). Essentially encouraging staff engagement with further study benefits both the individual and the organisation: as in-depth and analytical knowledge is developed job performance improves.

Benefit 2: Improved self-esteem

Improved self-esteem is a benefit associated with identity capital (Schuller, Preston, et al., 2004). As well as appearing strongly in the quantitative analysis, confidence appeared a total of 18 separate times throughout the qualitative interview responses, making it the most frequent of all the key themes. As confidence is often associated with self-esteem these terms were linked together throughout the data

analysis process. As one respondent put it: "The course is giving me confidence to step into a management role".

There are various explanations as to why returning to study improves self-esteem. Firstly, returning to the university environment requires individuals to interact in a series of unfamiliar social situations. This encourages individuals to develop their sense of self and promotes their self-awareness, thus improving self-esteem. Secondly, returning to study helps define an individual's strengths and weaknesses. By focusing on positive feedback and learning from constructive criticism individuals develop their self-perception, which in turn may improve their self-esteem. Lastly returning to study helps to develop talents and abilities. This can increase competence and confidence and ultimately improve self-esteem.

Benefit 3: Increased motivation to learn

Increased motivation is a benefit associated with human capital (Schuller, Preston, et al., 2004). This benefit was linked with knowledge, a key theme of the content analysis, and appeared a total of ten times in the qualitative analysis.

The research suggests that returning to study increases motivation to learn because those individuals returning to study genuinely have an interest in learning. Essentially, the act of learning is the motivation. Interest in learning appeared frequently throughout the qualitative interview responses. One female participant said, "I didn't study to get a pay-rise, or even career advancement. It was truly for the love of learning! But what I learned has really helped me in so many ways in my current job". Clearly the participants' enthusiasm to engage in further study is motivating mechanism in itself, but only one that is reinforcement to the intrinsic action of studying – not that the act of studying will be rewarded in other ways. These cannot be entirely disassociated: "I enjoyed learning new things, which broadened my perspective and enhanced my work performance". This makes the link clear between the joy of study and strengthened performance.

Discussion, conclusions

The starting point for this research was a need to understand the lower-than-expected take up of the Academic program by DHHS staff. In April 2012, respondents cited lack of time to study, lack of information about appropriate study options and lack of workplace/manager support for study as the key factors that assist or hinder DHHS staff. The LAMDU could only directly impact on the second factor, through information campaigns.

The August 2012 research identified the benefits that may motivate staff to overcome barriers and seek out enablers themselves. In these circumstances the implications for DHHS, and the role of the LAMDU, would be to publicise the benefits of further study, as well as to provide information about the specific courses and units on offer.

Implications for the three capitals model are largely associated with the weakness of social capital in relation to tertiary study by health and human services professionals. Social capital scored very low on all four individual benefits. Only 30% of respondents chose 'agree' or 'strongly agree' when responding to the statement that study resulted in improved personal relationships, while 50% chose 'neutral' as their response. This is in spite of other comments about staff relations improving.

Social capital is generated through relationships and does not exist as a 'personal attribute or asset'. This form of capital is most contextually situated and requires 'continuous effort' to maintain. When this effort is directed elsewhere, it can disrupt existing networks (Preston, 2004). As one of the respondents put it: "I work full time so trying to complete Uni as well has not left me any time to form wider social networks or increased opportunities to participate in extra-curricular activities." The three capitals approach does not ignore the neutral or negative consequences of decisions and recognises that benefits will inevitably come with costs – even if these are simply opportunity costs (Schuller, 2004b).

There are clear opportunity costs in these circumstances but their impact on social capital could have been mitigated if study strongly

associated with sociability with other students. The survey used in this research did not investigate whether tertiary study had been undertaken face-to-face or on-line, by 'distance' education. Qualitative feedback such as "My course is entirely on-line so there are no 'relationship' benefits!" suggests that survey responses may have been influenced by the move towards on-line tertiary education delivery. While it is acknowledged that on-line learning provides both convenience and flexibility (Jones & McCann, 2005), further investigation of the impact of distance or flexible education on social capital benefits may shed light on this apparent contradiction.

In conclusion, while DHHS may list a 'having a learning culture' amongst its corporate values, the translation of this, and other strategic directions, into practice will inevitably be inconsistent. Managers' lack of support and respondents' lack of time for study reflects the operational demands of a large, highly-utilised service and associated priority given to client service delivery. This, and the fact that DHHS staff are a highly professionalised, female-dominated group, will mean that the results from this research may not be applicable to all staff from all organisations.

However, the key findings of this study – that the major benefits of further study for these adult learners were increased self-esteem, improved job performance and increased motivation to learn – will be of interest to many employers and educators in the health and human services sector, and beyond.

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Exploring how short-term overseas study programs impact students' personal growth

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This paper is an exploratory study of the impact of short-term overseas study programs on participants' personal growth in business school environments. We interviewed students participating in such a program organised by an Australian university. Guided by the literature, we used three factors — pre-academic work, a three-week sojourn, and the participants themselves — in order to understand the association between the program and the participants' personal growth. We noted several idiosyncrasies amongst the participants that affected their level of

personal growth, including language ability, age, gender, extent of previous travel and ethnic background. Overall, all students experienced different levels of growth as a result of the program.

Keywords: *study abroad, short-term programs, personal development.*

Introduction

Australian universities have been actively engaging in short-term overseas programs since the 1990s, yet there is little research investigating the outcomes of such programs. Short-term is defined by St. Clair and McKenry (1999), Caffrey, Neander, Markle and Stewart (2005) and Edmonds (2010) as being two to three weeks' in duration. The principal aim of this paper is to evaluate the impact of a short-term overseas program on its participants within a personal growth context. In line with Doyle et al. (2009), we define personal growth as an improved awareness of global issues, and increased self-confidence and self-esteem. This involves the development of positive life skills within a realistic and healthy context.

In this paper, we initially address the conceptual orientations surrounding the impact of overseas programs on students' personal growth. We also discuss the processes employed in interviewing our accounting and finance students, followed by an overview of the data collection and its interpretation. Finally, we use the literature to classify the discussions with our interviewees into three categories, and report their observations as regards to how the program facilitated their personal growth.

Conceptual orientations

Personal growth occurs as the student matures and gradually moves from the unknown to the known. An international study program is a catalyst to this process of increased awareness. Abrams (1979) argues that higher education and global awareness are systematically linked. Students travelling abroad experience a different way of living,

consequently facilitating increased personal growth and eventually academic learning. Kauffmann, Martin and Weaver (1992) note that irrespective of the participants' maturity, travelling overseas has an overall effect on their thinking and behaviour.

The need to educate the student cohort to understand that we live in a rapidly changing and increasingly interdependent world is one of the key challenges within a business school. It requires educators to rethink ways in which to educate within an international perspective. Schirato and Webb (2004) note that students with an awareness of universal education relate better to the changing world. Davidson (2007) states that the notion of an overall education delivers knowledge and growth to the student. Furthermore, global education is synonymous with preparing students to be global citizens within a local society (Mohme, 2009). We concur with the relevant literature recognising the association of overseas short-term programs and personal growth.

International education

Studying overseas is an indirect way to internationalise the curriculum (Kauffmann, Martin and Weaver, 1992; Stroud, 2010). Universities have adopted an international approach and, consequently, we are seeing a rapid increase in interest from students enrolling in international education programs. In the past, Australian universities have struggled to attract students. However, over the past couple of years, due to reasons we are unaware of, interest in such programs has increased significantly. This international trend is in line with the institutional goals of most Australian universities. Cooper and Grant (1993) and Stroud (2010) point out that research of U.S. students enrolled in overseas programs attracts considerable academic attention. However, in view of the current body of research, there is a paucity of information regarding Australian students studying abroad, particularly in short-term programs. Hence, there is a gap in the literature, and with Australia being seen as a main education provider within the Asian Pacific region, this study becomes more relevant.

Australian cohorts participating in short-term international programs are represented by a high number of international students (Webb, De Lange and O'Connell, 2010). The level of professional and personal growth experienced by participants may vary according to their cultural backgrounds. Cushner (1988) and Allen (2009) argue that international awareness is not a direct consequence of cognitive growth or physical maturity. The experiences need to be nurtured, and are critical to attitude and knowledge formation. Hence, a carefully structured program is required. The world must be viewed outside oneself, and the local traditional level replaced by a national modern level (Cushner, 1988; Tarrant, 2009). We concur that this is a critical aspect of the international education debate.

Participants' age

The perceived benefits of international study programs with respect to participants' growth has attracted the attention of mature students (generally defined as anyone above 30 years), as they also strive to attain a higher level of international understanding (Kauffmann, Martin & Weaver, 1992; Hadis, 2005). This aspect of international study programs has not received sufficient attention within the literature, as most existing studies assume homogenous participants (Zorn, 1996). More and more mature-age students are participating in international study programs, and we argue that this new phenomenon should be investigated.

Participants' immersion

A high level of immersion by the students whilst on the program helps them link their prior learning with their overseas experiences. There are several idiosyncrasies worth observing. First, well-travelled participants provide valuable assistance to their colleagues, and are a source of reference for the rest of the cohort. Secondly, participants are able to establish interconnections between the local and global scenarios, in the process increasing professional growth and developing a global view. Finally, the combination of on-campus learning with the study program experiences enables participants to increase professional growth and personal knowledge. Opper,

Teichler and Carlson (1990) argue about the importance of the intensity participants experience whilst in the host country. This will teach them lessons for life, and it is therefore important that programs ensure students experience such intensity.

Most programs start with pre-academic work, embedding participants within the program. Poole and Davis (2006) document this process, and allude to the importance of a proper structure when the initial contact with the participants is established. Allen (2009) argues that the interactions in the classroom prior to travelling overseas facilitate social cohesion within the group. A program that does not adequately prepare its participants jeopardises the effectiveness of the whole program, as academic integrity may be questioned. Subsequently, the more academically prepared participants are, the more intense the overseas experience is.

It is well established that long-term study abroad programs can increase a student's professional growth (Kauffman, Martin & Weaver, 1992; Edmonds, 2010). Students' maturity and the level of immersion in the host culture affects the students' sojourn. Such factors in turn impact students' intrapersonal understanding, interpersonal relations, values and ultimately their life directions. In terms of personal growth, the literature states that students considered as less developmentally mature experience more personal changes than their more mature colleagues (Chieffo & Griffiths, 2004). Conversely, more mature participants are more likely to attain higher immersion levels. Ingraham and Peterson (2004) argue that less mature participants who only superficially expose themselves to the host culture, experience less immersion and subsequently little personal development. In line with Ingraham and Peterson (2004), we note that every student cohort will always have diverse levels of commitment, and personal growth will always remain a function of commitment.

Personality traits

Personal growth is motivated by the interaction between the person and the environment, i.e., between the self and the world hosting the

self. Kauffmann et al. (1992) describe a model of the transformation process involving growth stages: autonomy, belonging, values cognition, vocation and worldview. The participants' intrapersonal development skills impact on their increased tolerance of people different to themselves. Jurasek (1991) and Poole and Davis (2006) note that sojourners experience different perceptions as they progress through the program, and consequently become uneasy as they explore another culture's epistemology. As a result, students are more likely to become more cognitively flexible and able to tolerate ambiguity and uncertainty (Jurasek, 1991; Tarrant, 2009).

Doyle et al. (2009) investigated personality changes with regards to students participating in overseas study programs by observing their pre- and post-personalities. Their findings show that following the program, students: (i) change their world view and consequently have an increased interest in reflective thought, e.g., in the arts, literature and language; (ii) have increased interest in the welfare of others; (iii) have greater interpersonal development, increased self confidence, self esteem and independence, with appreciation of sensual reactions and feelings.

Opper et al. (1990) focused on the impact upon participants by examining overseas programs promoting movement between universities in the U.K., France, Germany, Sweden and the U.S. Furthermore, Opper et al. (1990) noted differences between the students' profiles in study abroad programs and the overall student population.

Well-travelled

The degree participants have travelled previously is another critical factor that must be taken into consideration. There is a positive correlation between the participants' travel experiences and the likelihood of their participating in an overseas study program at all (Burn, 1995; Dwyer, 2005). Well-travelled participants already have expectations of overseas programs. They are often well prepared and are a source of information for other less experienced candidates. A well-travelled participant generally knows more than one language

(i.e., of one of the host countries, other than English). Hence we note that the well-travelled student is eager to immerse him/herself in such a program.

Out-of-class experiences

This aspect of study abroad programs is not well researched within the literature. Yet we argue that this forms another crucial feature of the program. Students' interaction with the people of the host country is important for the overall experience and intensity of the program (Brux & Fry, 2009). Experiences such as ordering food in a restaurant, or asking for street directions are small steps in a journey towards experiencing the host country's culture. Socialising with European students and gaining insights into their learning styles, university life and social activities is a fascinating experience for many of our students. All experiences, even negative ones, cultivate the understanding of the host country. In addition, Allen (2009) finds that studying abroad has a significant effect on the growth of students' personalities. Overseas study programs encourage students to adjust to situations they are unaccustomed to, and to take on new responsibilities (Poole & Davis, 2006). Carlson and Widaman (1988) refer to such perceptions as "world mindedness". Additionally, Brislin (1981) and Lindsey (2005) note that participants' favourable opinions of other countries are directly related to constructive exchanges with host nationals, developed through studying abroad. Therefore, we observe that "out-of-class" experiences are an integral part of the program, insofar as maximising personal growth is concerned.

Research design

We engaged in a qualitative study of students' reports, founded on the constructivist interpretive paradigm. We assert that participants "make meaning" of a phenomenon or situation (Denzin & Lincoln, 2005). This implies a conception of reality as a multi-layer, interactive, shared social experience, interpreted by the individuals. We are concerned with understanding the meanings our business graduate students give to their surroundings whilst participating in a European study program within a context of personal growth. The

study examines the impact of the program on their personal growth as interpreted by the students themselves.

We invited all students who had participated in the programs for the past four years (as we do not have access to students' records prior to 2009) to engage in semi- structured interviews. Nine students accepted our invitation to be interviewed.

Table 1: Details of participants

Partici-pant	Gender	Age bracket (yrs)	Current status	No. of yrs in Australia	No. of overseas trips outside Australia	Local/ Inter-national student
A	F	20-25	Working	2	1	Chinese
B	F	20-25	Working	N/A	None	Local
C	M	25-30	Working	N/A	1	Local
D	F	20-25	Working	N/A	3	Local
E	F	30-35	Studying	3	3	Chinese
F	M	20-25	Gap year	N/A	None	Local
G	F	25-30	Studying	4	1	Vietnamese
H	F	20-25	Studying	2	1	Malaysian
I	M	20-25	Studying	3	5	Indonesian

No attempt has been made to link participants with the program year. This was done intentionally in order to preserve the students' anonymity.

Three participants represented the 2009 program, three the following year, two the 2011 program, and one the 2012 program. All interviews were held on a one-to-one basis and the anonymity of the participants was fully respected. Each interview had an average duration of approximately 25 minutes.

Guided by Allen (2009), Kim (2007) and Thorpe (1993), we structured our interviews based on three factors: (i) the preparatory work every student underwent prior to travel; (ii) the three-week program; and (iii) an overview of the participants. Each factor sought

to establish the impact of the program on the participants' growth as interpreted by the students themselves.

Two participants were randomly selected for a pre-interview pilot study. Guided by the three-factor framework, each interview was recorded, transcribed and interpreted as a way of making more explicit use of the interviewees' experiences. We listed their shared experiences, transcribed the conversations and handed the documentation over to the two participants, asking them to reconstruct their experiences in a chronological and/or logical order.

The participants' experiences, collated from the initial pilot study, formed the basis of further dialogue for the rest of the interviews. All the interviewees were keen to share their experiences, and the semi-structured interview approach facilitated the discussions. Their responses provided an array of information, with some differences in opinion in certain circumstances, as documented in the following section. Based on the literature, we categorised all of the participants' experiences emanating from the interviews into three factors. Although the three factors are presented separately, they are all inter-related and contributed equally towards achieving personal growth via the short-term program.

Students' reflections

Preparatory academic work prior to travelling overseas: All nine participants commented on how important this phase of the program was for developing personal growth. There is relatively little literature on the preparatory academic work, with Poole and Davis (2006) and Allen (2009) only recently highlighting the importance of this crucial stage. In our programs, we requested students to attend an intensive on-campus session over a one-to-two-week period prior to departure. Participants A and G, both being international students with very limited travelling experience, voiced their anxieties in meeting the rest of the group:

> I am quite a shy person and initially found it difficult to interact with other students within the group. I did not know anyone and thought of withdrawing but it was too late. The barbeque

> organized by the coordinators helped to break the ice (Participant A).
>
> My friend and I made sure we stay together as we did not know anyone in the group. But as I was going to spend three weeks with other students I felt I had to interact more with the rest of the group. Normally I would not make an extra effort to socialise as I feel nervous doing so (Participant G).

Such feelings of insecurity are obviously a major stumbling block to a student's personal growth, and we sought to address this issue by organising meet-ups and barbeques. From an academic perspective, we developed group assignments to encourage students to work in groups. Their task was to develop an intelligence report on the business organisations we were about to visit. The students' interaction and preparatory work allowed them to become more knowledgeable, and also provided an opportunity to practice public speaking, hence helping them develop new skills. The main focus centres around helping the student grow within a controlled environment. Participant E expressed her concerns:

> Knowing we had to present our ideas in front of the group made me nervous, especially since English is not my first language (Participant E).

On the other hand, participant B, being a local student, saw this exercise as an opportunity:

> Overall I felt good discussing my points of view. Good presentation skills are critical especially for job interviews (Participant B).

The rest of the interviewees did comment that initially they were apprehensive about the notion of presenting their ideas to the class. However, as they knew this was going to be common practice in the program, they decided to engage further and thus develop new abilities that could be overlooked in an on-campus environment. This is an example of how course design affects students' ability to grow. Furthermore, the business visits' location and their surrounding areas intrigued a number of students, with Participant H commenting:

> I spent hours on Google Earth learning where Italy is and how close it is to other neighboring European countries. I also investigated the distance from the hotel we were staying in Paris and the high-end fashion strips to visit during their time (Participant H).

It is evident that the program, for Participant H, was not only an academic exercise but also a real life experience, helping her become more cognisant of the world around her. Every student had their own expectations and vision of what a European trip would be, and the ongoing discussions prior to our departure helped them formulate a more realistic perspective. Therefore, the program developed into a life learning experience.

From a purely academic perspective, the preparatory work facilitated the students' perception of the organisations and financial institutions making up the business visits. More specifically, the completion of the intelligence report during the pre- academic work phase allowed group members to gain a comprehensive understanding of the organisations they were about to visit. As Participant A was working full time, she commented as follows:

> Reading and researching about the UN Food for Aid Agency gave me an insight into another world that I would have never stopped and consider. Reading papers and documents over the summer break was not something I looked forward to but throughout the program it became more evident how important this is to gain a better understanding of the organisations we visited.

Participant B was also in fulltime employment, and appreciated the notion of international exposure to global affairs, commenting as follows:

> The European Union concept was something we hear about but never gave it much importance. After visiting Europe this was a real eye-opener and visiting the main institutions is an excellent experience (Participant B).

We argue that there is a positive association between the academic input before travelling and the amount of personal growth

participants experience during the program. Overwhelmingly, all interviewed students commented that they felt more confident as a result of the program, both in terms of interpersonal relations and intrapersonal understanding. Furthermore, preparatory academic work is also directly related to the two other factors leading towards the development of personal growth.

The three week program: The design of the program within a business school context is critical to achieve maximum growth. We selected the business visits based on a theme. The Global Financial Crisis (GFC) raised a number of discussion points, ranging from prudential regulation to macro economic incentives within a financial institution's context. For a business student, this is an ideal situation, as they link theory with practice. Students appreciated the exposure to the array of institutions and organisations that private citizens do not normally have access to, and mixed reactions subsequently emerged from the interviews. Participant F was a local student with no work experience and commented as follows:

> For me the highlight of the program was the visit to National Australia Bank's (NAB) trading room in London. It's something I would really like to do (Participant F).

Participant H was a Malaysian student with no previous work experience, and felt the intensity of the job and subsequently commented as follows:

> Treasury dealing is an extremely stressful job. High pressure job, not something I want to do (Participant H).

By observing the dealers at NAB executing key decisions in terms of trading activities, students were able to relate theory to practice. Such experiences represented a huge leap in terms of their personal growth, placing their academic studies in perspective (Davidson, 2007). This motivates students to inquire further, providing their studies with meaning as they move from theory to practice.

The design of the program has the ability to forge life-long impressions, assisting participants in their career choices (Salisbury, 1991; Kim, 2007). The experiences allowed our participants to extend

their exposure and eventually get a glimpse of the corporate world by entering different organisations' boardrooms, whether those of not-for-profit entities, regulatory government agencies or commercial banks. Several interviewees commented as follows on the choice of business visits:

> It was awesome sitting in the boardroom of the Swiss National Bank, the same place where on a monthly basis executive directors meet to decide on the country's interest rate (Participant C).

> As an accounting student the visit to the International Accounting Standards Board (IASB) is inspiring and experiencing a presentation in the boardroom where standard setters representing jurisdictions from around the world deliberate on future accounting standards is a feeling I will cherish (Participant G).

> Ever since my first year banking studies at Uni, we had heard of the Bank for International Settlements (BIS) located in Basel, Switzerland. Listening to one of the leading economists on the potential impacts of the Basel Prudential Regulatory Framework on global banking helped me appreciate more the work carried out by this institution (Participant I).

Furthermore, as participants present their ideas and observations to the business visits' hosts, such visits are opportunities for them to practise their presentation skills. This ties in closely with the previous factor, i.e., the pre-academic work is found providing students with the confidence and direction required to face challenges whilst on the program. Participant D, one of the more confident students in the program, commented in regards to one of the meetings at the headquarters of the European Union in Brussels:

> I never thought I would stand up and ask a question to one of the European Commissioners present in our meeting. I think he liked my Aussie accent and after the meeting asked me which football team I go for (Participant D).

Finally, with small and medium businesses being the backbone of any economy, it is important that participants engage with such business

owners. We generally arrange for our participants to visit a number of small textile business owners in Prato, Italy, touring factories and viewing the manufacturing processes as well as discussing current challenges with the business owners. Issues of funding and compliance costs usually surface. However, both Chinese participants, Participants A and E, were surprised to observe the Asian labour force and community operating in such an area and commented accordingly. The other participants did not comment.

> Never expected to see such a large Chinese community in Prato. Back at home in China, we often hear of stories where Chinese travel overseas for work and being Chinese myself it makes me feel good and now more comfortable in travelling overseas.

Overall, all participants commented that the thematic choice of the program and the business visit selection had a significant impact on their personal growth.

The participants: All participants are idiosyncratic, and will respond to the program in different ways. Irrespective of their skills and attributes, all participants stand to benefit in varying degrees in terms of personal growth. Overseas study programs are not designed to address one type of student cohort, but a diverse audience, which reacts in different ways to the immersion levels throughout the program. Some engage more enthusiastically than others, and throughout the three week program, it becomes apparent how different participants behave and consequently continue to grow. The general observation from the participants' point of view is that travelling around Europe, the people in the host countries are reasonably friendly. However, Participant B, being a local student and on his first trip outside Australia, commented:

> Being constantly asked for money by gypsies whilst walking and minding my own business is something that made me uncomfortable. Even the sight of beggars and using their new born babies as an excuse for me is quite daunting.

Concerns were also present amongst well-travelled students, with Participant I raising the following:

> I was somewhat scared seeing police armed with semi automatic guns in Paris. My vision of this wonderful city was good food, high-end fashion and safe streets. I think we take our safety for granted.

Paige (1993) postulates that the more the host country is perceived by the participants as being different, the more psychologically significant the overseas study program becomes. This is in line with some of the participants' comments and observations, where they became more aware of their own ethnocentric behaviour and consequently appreciated what before would be taken for granted. Participants with a basic knowledge of French, Italian or German also experienced a greater psychological intensity as they attempted to communicate with people from the host country.

For some students, the program was their first time abroad. Thus, there is always the fear of the unknown. However, once we arrived at our first destination in Europe, they began to understand how Europeans live. Their curiosity of what to expect next was sustained as we travelled from one country to the next. The notion of waking up in a different time zone is generally an awkward feeling, with Participant B commenting:

> The 12 (approximate) hour time difference is a pain and requires some time to get used to, but I guess it's part of the overall experience.

We also found with Participant B that his Italian background was one of the motivating factors for the participant to take up the study abroad program. This observation connects with the student's comments facilitating his/her self esteem and a sense of belonging. In general a fresh sense was experienced within a global perspective.

Most students commented about differences in their personalities, increases in self-confidence, and more intense views on global issues. This seems an obvious progression when students are addressed by key economists from top institutions such as the Organisation for Economic Co-operation and Development (OECD), the Swiss National Bank, the Bank for International Settlements, as well as

traders from global banks, regulators and standard setters from the International Accounting Standards Board, the European Commission and professors from leading European universities. Consequently, participants become more self-assured, and as accounting and finance graduates, they relate better to current issues and apply for jobs with more confidence. All of the participants seeking jobs commented that they made reference to the study program on their curriculum vitae and/or discussed aspects of the study program during their job interviews. Participants C and D commented respectively:

> Well, if I want to stand out from the rest of the job applicants, I had to discuss about something different and the program was a great opportunity.

> The program was the main subject of discussion during my job interview and I feel that it did help in getting my current job.

The interaction of all three factors contributes towards an increased level of personal growth. Overall, we argue that the study program design is critical in addressing the growth issue from the participants' perspective. Consistent with the literature, we acknowledge that participants will experience different levels of growth, depending on the exposure to three factors recorded in this study. Students appreciate the preparatory work prior to travelling on the program and the organisation intelligence reports provide participants with a useful overview of each organisation. Since the business visits are mainly financial institutions and regulatory authorities, it is essential that students familiarise themselves with such institutions prior to departing. This serves to empower them and gives them clarity to engage in discussions amongst themselves and during the business visits. Additionally, participants acknowledge a degree of commonality amongst the participants and their respective learning processes. With respect to personal growth, they seek answers to their questions, and as a consequence, new skills are developed which are not possible to attain whilst studying on campus. In short, conceived ideas and perceptions emanating from the study program enable participants to form an attitude which results in a feeling that accompanies them throughout their lives.

Although the program has its merits, it is not without its problems. Participants C, F, and I commented that they wished they could have spent more time overseas. However, due to the time and financial constraints, such a situation is not always possible. Participants C and D commented that the pre-planned program, with arranged accommodations, meals and transfers, is highly convenient for the participants. However, they also commented that it did limit their immersion and overall experience. This is why we feel that it is necessary to allocate sufficient free time for participants to engage in other activities whilst overseas.

Conclusion

In this paper, we explored the impact of a short-term overseas study program upon students' personal growth within a business school environment. It is clear that all participants, albeit at varying levels, experienced personal growth. We have also noted a number of idiosyncrasies present amongst the participants. The more well-travelled participants (D, E and I) were eager to immerse themselves in the program, and were often a point of reference for the rest of the group. The less-travelled sojourners were initially anxious as to what to expect, especially the international students.

However, throughout the three-week sojourn, they reacted positively, and subsequently become more knowledgeable and responsible. The participants' public speaking skills were also tested and most of them, particularly B and E, made an effort to practise such skills, as they were aware this is a requirement during the job interview process. In addition, Participant B with an ethnic background similar to the host country, found renewed identity. Furthermore, the lack of language ability in several host countries did not necessarily limit the participants' immersion experiences, as they challenged themselves in finding ways to communicate. Overall, every participant experienced different levels and intensities whilst on the program, and gained personal learning experiences they will carry for life.

We feel that the program design increases immersion, with participants developing new skills by directly experiencing and

relating their learning to ongoing events, providing clarity and useful insights into their learning processes. In terms of personal growth, all participants noted that they felt more confident, more tolerant and understanding towards others compared to when they started the program. All participants commented that they were also able to establish interconnections between local and global scenarios, increasing their personal growth in the process and advancing their global perspectives, which are critical attributes for business graduates.

Finally, as expressed by the students themselves (C, F and I), the three-week sojourn limited their immersion experiences. However, as time and budgetary constraints continue to limit overseas programs, short-term sojourns are becoming more common at Australian universities. Therefore, further research may explore the lasting impressions by way of a longitudinal study linking how the program helped them with their life-long personal growth.

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Denis Binnion
WEA Adelaide CEO (retired)

In 1913 Australia was a bustling place with great enthusiasm about the future as six disparate states tried to work out the operations of their new federal government system which was a mere twelve years old. Travel between the states was generally by coastal steamer, the fastest and most comfortable form of transport available then, and more often than not interstate travellers voyaged on the fleet of the Adelaide Steamship Company which plied the waters from Cairns to Sydney to Fremantle. One passenger who travelled this coastal route between the six capital cities in 1913 was Albert Mansbridge, the founder of the Workers' Education Association in England ten years earlier. Mansbridge hoped his English organisation would "promote the higher learning of working men and women" in Australia just as it had in England. With almost religious fervour and much enthusiasm he took his organisation to the colonies in Canada, Australia and New Zealand. In Australia Mansbridge visited all capital cities where he conducted public meetings calling for the formation of a WEA in each state. His trip to Australia was a great success and WEAs emerged in all states in 1913.

The financiers of this trip from England were a handful of the unions and the state universities. Mansbridge was doing the standard university lecture tour around the country. But as the foundling WEA organisations emerged other groups became the major sponsors and supporters, as the unions fell into the background but not into oblivion. The state governments came to the party with some limited funding for classes and the relatively newly enfranchised women of Australia took the opportunity to influence the development of the democratically governed WEAs. The Kindergarten Unions (exclusively female) and the Women's Christian Temperance Unions all played a part in establishing this new adult education service. The mission of the WEA was to break down the barriers ordinary working men and women faced in either attending or even accessing the type of education that universities provided. In this era most "ordinary" Australians did not progress beyond primary school. High schools, especially outside the capital cities were few and far between. Most school teachers had had none or only a few months of teacher training. The populace was keen for "higher education". And that is what the WEAs originally provided for men and women who joined the year long university courses for minimal fees but with no examinations or paper qualifications at the end. Those who could not afford more than primary school education warmed to year long courses in economics, political history and English literature. The WEA was meeting a great social need for education for adults beyond what they had received in primary school.

Over the years the mission of the WEAs changed as did the times and nature of Australian society. As attendance at high school became universal after World War Two the demand for university style courses faded and the surviving WEAs and the organisations into which some had been subsumed, like the CAE in Melbourne, altered their educational provision. Shorter courses in a broader range of subjects became the fashion as people wanted help with their daily living rather than university style programs. Home Decoration, Hostess Cooking and French for Travel became popular along side of a range of "second chance" education programs for those who had not succeeded as they had hoped at high school. Remedial Mathematics, and Basic English Grammar courses and literacy programs

complemented the home improvement type courses. With increasing levels of education in Australia and increasing standards of living the range and focus of provision altered again in the 1970s and 1980s. The WEAs introduced "lifestyle" courses in alternative medicine, interpersonal relationships and communication. The educational provision increasingly was related to life changes and the needs that they produced: - changing employment or losing employment; terminating or beginning new relationships or families; planning overseas travel; buying a new house or moving house; planning for retirement or a new baby; or coping with and learning about new technology- computers, the internet and digital photography.

So what about the future? Despite the development of online learning for formal qualifications this applies less readily to non-formal adult learning. Much research has shown that adults attend adult learning classes for a variety of reasons including social contact. Any online course in ballroom dancing will never have the appeal of a class at the local WEA dance hall! After all in the 1950s the WEA was known to stand for "weddings easily arranged." The terminology might have now changed but the basic motivation for attending classes with others has not. People like to share common interests, socialise with others and potentially find a suitable person for a new friendship or relationship. Furthermore the WEAs have had 100 years of experience in changing and adapting to changing social circumstances. They will continue to do that. In recent years WEAs have added local and overseas study tours, some accredited computer training and tailor made workplace training programs to their course offerings. As the WEAs respond quickly and efficiently to changing demand they will alter and survive into the future as they change course offerings, types of provision, locations for delivery and their use of new technology. The democratic student and community focused governance of WEAs will also ensure that they change and survive. Students will have direct influence on the future direction of the WEAs just as they have had over the last 100 years.

About the author

Denis Binnion *joined the South Australian WEA in 1979 as a course programmer in language and liberal studies. He became CEO of the WEA in Adelaide and led the organisation for nearly twenty years. In 2012 he became a member of the Order of Australia.*

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A century of learning: WEA Sydney 1913-2013

Michael Newton
Executive Director of WEA Sydney

WEA Sydney has made enormous strides since a meeting was held in Sydney on 3 November 1913 to establish a Workers' Educational Association in Australia, with Albert Mansbridge (the WEA's founder in the United Kingdom) presiding.

From mere concept, the WEA rapidly offered its first courses, and was guided in its first half century by Scottish-born carpenter David Stewart, who was the association's general secretary until his death in 1954.

The association was established in the United Kingdom to give working men and women access not to narrow vocational education (in the sense of trade training), but to the broader world of liberal education (history, philosophy, political economy, literature, the arts, natural sciences), in the context of rapidly evolving new understandings of human society and the nature of human beings and their place in the universe which were emerging in the early 20th century. Albert Mansbridge believed that all in the community, including working men and women, needed such knowledge and

understanding to function as citizens in a modern democratic community.

Mansbridge's family and upbringing were working class, and perhaps because of this, unlike 19th century educational reforms associated with Mechanics Institutes and Schools of Art, he always had tremendous respect for the traditions of labour and the efforts of working people to educate themselves.

It was a cherished conviction of his that more scholars had arisen from the working class than any other group. He is quoted as believing that a carpenter was as good as a poet and both could fashion lovely work. All women and men were capable of taking part in the progress of mankind if only given an opportunity.

A number of philosophical, social and political ideals came together to make Mansbridge's WEA concept possible in the early 20th century. The beliefs and motives of the WEA's founders were profoundly held. It was felt that to live in ignorance, to be subject to illusions and prejudice, constituted a severe deprivation. For an individual person to be left in ignorance was to condemn them to a less than fully human existence. It was felt that the extent to which a society deprived its members of the opportunity to overcome ignorance, that it was an imperfect one. Those who recognised this state of imperfection had a moral obligation to alleviate it.

The founders of the WEA in Britain and Australia also recognised that educational deprivation and ignorance were largely socio-economic, and that the majority of the population, the working class, were generally denied access to the education system and the acquisition of knowledge. This added an almost missionary dimension to the WEA, for the educationally deprived working class were seen as spiritually starved of knowledge and denied full access to the benefits society could bestow.

The intellectual forbears and organisational founders of the WEA were thus imbued by a concept of a fulfilling human existence, and what contributed to a flourishing democratic political and social

order. Their answer was to found an organisation, which was dedicated to '*the higher education of working men and women*'.

Under this slogan, a group of academics such as R. M. Tawney, leading churchmen such as Archbishop Temple, and workers in the trade union and co-operative movement came together with Mansbridge to found the WEA, and subsequently export it to Australia and other parts of the world.

Thus the WEA began its life with a very distinctive educational philosophy – a belief in the higher education of working men and women. This philosophy has certain implications:

- The educational process is one in which teachers and students are engaged in a voluntary and co-operative activity in the course of which all the accumulated information relevant to a topic or subject is presented and critically evaluated.
- Furthermore, given the above features of the educational process – the fostering of voluntary and co-operative critical inquiry into objective phenomena – there are implications for the individuals involved. The practice of disinterested and rational critical inquiry amongst adults is seen to lead to the development of individuals who are less likely to be prejudiced and more likely to resist propaganda or media manipulation. They would become liberally educated citizens.
- Finally, there were seen to be implications for the organisation of an educational association espousing such beliefs. The concept of voluntary and co-operative activity was to permeate all aspects of the WEA's work. Not only in the classroom were a group of equals seen to come together in the common pursuit of knowledge, but the WEA itself as an organisation was to be a working model of voluntary and co-operative activity in the pursuit of developing its educational work, both at the level of its management, and in the administration and delivery of its classes.

It was this missionary zeal that led Mansbridge to Sydney in June 1913, and to establish contacts with similar minded individuals in Sydney with the aim of founding the WEA in Australia. The seed was

successfully planted. As Darryl Dymock wrote in his history of WEA Sydney,

> "In 1914, less than twelve months after the Workers' Educational Association (WEA) arrived in Australia as a transplant from Britain, the first director of tutorial classes at the University of Sydney, Meredith Atkinson, made a prediction:
>
> > the WEA has come to stay in Australia. I can say this of NSW after a month's intimate acquaintance with the heart of the Association ... In Australia there seems to me to be an almost ideal environment for the accomplishment of the great aims of the WEA – the creation of an educated democracy, a nation of men and women moved to give of their best to their country (Dymock, 2001, 1)"

While the geography of Sydney has changed dramatically over the last century, WEA has indeed stayed; more than that, it has grown, survived turbulences, moved house, reached peaks of enrolments of over 20,000 students a year ... all the while remaining true to its founding vision. WEA Sydney's current Mission Statement starts by saying in clear tones: "WEA Sydney is a voluntary, independent, not-for-profit adult education organisation. Our mission is to provide adults with stimulating and varied educational activities which develop their knowledge, understanding and skills. Within our program we place special emphasis on providing opportunities for the serious and objective study of the arts, humanities and sciences." The Mission Statement ends on an equally determined note: "We believe that WEA activities are of value to individuals both in their personal life and in their role as citizens in a democratic society."

WEA's classes in Australia have always been open to all who subscribed to the association's objects, namely that the classes should be provided for working men and women – in effect, classes were open to all in the community. Those who participated in WEA's classes included working men and women (people who earned "wages"), people who earned salaries ("white-collar workers") and those whose work was outside the paid workforce (for example, mothers at home caring for young children) – all possible definitions of "worker".

Under its democratic governance of councils and executive committees in which the association's members participated in an honorary capacity, WEA Sydney was finally able to move from rented premises to its own building at 72 Bathurst Street in 1971.

Having facilitated the provision of university extension classes by the University of Sydney (as well as a limited number of its own courses) since its foundation, the WEA in Sydney had to provide all of its own courses (including evaluation of tutor qualifications and course proposals) when the University of Sydney withdrew from its alliance with WEA in 1983.

Separately incorporated from the former WEA of NSW in December 1993, WEA Sydney looks forward to continuing to provide liberal adult education to all in the community long after it celebrates its official centenary on 3 November 2013.

The author acknowledges the contribution of Richard Pinder and Leth Maitland to this article.

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About the author

Michael Newton *joined the WEA in Sydney in 1991 where he was responsible for planning and managing WEA Sydney's keynote range of humanities and social sciences courses. In 2009 he became the WEA's Executive Director.*

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The WEA in Sydney, 1913 – 2013: Achievements; controversies; and an inherent difficulty

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One hundred years ago a meeting was held in Sydney to establish a local Workers' Educational Association [generally known as the WEA]: this was just some ten years after the original foundation of the WEA in the United Kingdom. Today, in a much-changed world, the Sydney WEA is still functioning, indeed thriving, even though recent circumstances have proved to be difficult for the WEA and other local providers of adult education. But the WEA of 2013 is not the WEA of 1913.

Overview

Today, workers' education is generally regarded as a sub-field of adult education. However, one hundred years ago, the term workers' education and adult education were often used interchangeably. For many adult educators, the fundamental purpose of adult education

was to reach those working class adults, who had been ruthlessly sifted out by the formal education system. Founded in 1903, *as the Association to Promote the Higher Education of Working Men*, the Workers' Educational Association [WEA], the name it adopted in 1905, may well qualify as one of the most successful examples of educational colonialism as practised by imperial Britain. Within a decade or two there were WEAs operating in all the "white" dominions of the old British Empire. But while these various WEAs shared many common characteristics, the story of each was obviously shaped by its own local socio cultural environment.

This paper traces the development of the WEA in Sydney. Its development is outlined briefly, a number of difficulties that it has faced are discussed, and finally an argument is advanced as to why it evolved as it did. A central theme of the paper is an attempt to explore the conflicts that developed over the 'true' purposes of workers' education. Were such purposes, essentially social and class based, *or* were they essentially personal and largely individualistic? Contrary to both these points of view, Albert Mansbridge, the founder of the WEA, seems to have believed that education was some thing that was ideal in and of its self, some thing that was completely divorced from personal or material improvement or even social and political change. As time passed, the programs of the Sydney WEA seemed to drift inevitably towards the personal fulfillment end of the educational continuum.

The beginnings of the WEA

When the WEA was founded in 1903 in Britain, the organisation had two principal goals: to stimulate and coordinate all working class efforts of an educational nature and to develop a partnership between the working class movement and the universities. It was felt that a network of classes organised by the WEA but taught by university staff would permit able working class persons to breach the barriers of social stratification. In 1906 Mansbridge became the fulltime General Secretary. In 1907, the WEA adopted a constitution, which devolved most of the power to the Districts and Branches. Also in 1907, the WEA turned its attention to the educational needs of women. In 1908,

the Highway, the Association's official journal began publication. In 1909, the Association took up the cause of rural workers. All during these early years, its class offerings were growing rapidly and so was the WEA as a voluntary association. Although most WEA members were principally interested in studying the so-called "WEA subjects" [i.e. the social sciences and humanities] many local WEAs organised a wide range of other educational activities to meet the needs of their affiliated bodies and members. These included: nature study rambles, art and craft classes, teaching methods for Sunday School teachers, practical parenting skills, first aid, gardening, foreign languages and so on.

The main educational weapon of the WEA had been intended to be the University Extension lecture. But this did not prove to be completely acceptable to the learners and it was soon replaced by the modified lecture plus discussion of the tutorial class approach. Soon even this was found to be too demanding for many students and a range of shorter, less demanding formats were introduced to supplement the serious university level study of the three year, weekly attendance, essay writing tutorial classes But officially, the WEA's position remained that instruction must aim at reaching, within the limits of the subject being studied, the standard of university honors level study.

The concern of the WEA for high academic standards was linked to its official commitment to objectivity in study. The non-party political/non-sectarian nature of the association was stressed at every opportunity. Mansbridge firmly believed that without such a stance, the WEA could not gather in workers of all political persuasions or secure the support of all major political parties and an ongoing share of public educational funding. This position was further complicated by the fact that the Association's founder thought of education as something ideal, in and of itself, completely uncontaminated by any desire for personal advancement or even social and political change

However, these beliefs led many leftwing critics to regard the WEA as a tool of the ruling classes. The WEA's alliance with the then elitist universities remained one of the left's principal targets.

Notwithstanding, the overblown rhetoric of many on the far left, the WEA did receive the support of the British Establishment, both political and bureaucratic. Why was this so? Jennings [1999, 21] claims that there were four attitudes, then current among those in power, that predisposed the politically powerful to be sympathetic to the goals and methods of the WEA.

- There was a growing sense, among the wealthy, of social obligation and even of guilt attached to past privilege.
- The established Church had become more and more convinced that something had to done for working people
- In the interests of national efficiency and international competitiveness, it was essential to develop a means whereby smart working class boys could rise to nearer the top.
- Finally, there was a need to contain, or at least shape, the rising power of the labor movement.

To whom does the WEA belong?

Before we leave the "motherland" there is one last issue that we should canvas. In 1924, the British WEA celebrated its twenty-first birthday: its coming of age. That year the summer issue of Highway, the Association's journal, featured a range of opinions as to where the WEA should be going in its second 21 years. Mansbridge emphasised the value of education for its own sake and rejected, almost out of hand, any idea of using education for social purposes. GDH Cole sought wider and stronger inks with the organised labor movement. While William Temple sought to reconcile the intrinsic value and the social purpose points of view.

Perhaps, the most challenging and perceptive position of all was that taken by Barbara Wootten, then the Editor of *Highway*, who asked an interesting, if unpopular, question: "To whom does the WEA belong?"

All sorts of people from all social levels needed and wanted classes and educational experiences, she went on to argue: Should the WEA provide education haphazardly to all? Or, had the time come to concentrate on working through and with the working people

and their organisations. In other words: *Was the WEA about adult education in general or workers' education specifically?* This question has remained a burning issue right across the WEA right up until the present day.

The WEA idea spreads to Australia

In May 1913, a dinner was held in London at the Working Men's College to farewell Albert and Frances Mansbridge, who were about to leave for Australia to spread the gospel of the WEA. In an extremely busy tour, he spoke at university and labor meetings, addressed other community and professional bodies, and preached from Anglican and nonconformist pulpits. In NSW, the Labor Council ground had been well prepared by Dave Stewart, a carpenter who was to become the NSW WEA's first General Secretary, a position he held until his death in 1955. Moreover, the politicians and educational bureaucrats were sympathetic. The WEA was an idea whose time had clearly arrived. On November 3rd 1913 a meeting was held to finalise the WEA's Constitution, which described the WEA as strictly non- sectarian, democratic, and non-party political. The new Labor government and progressive educational bureaucrats were able to bring appropriate pressure, both moral and financial to bear on the University and a Department of Tutorial Classes was established in 1913.

Thus, in NSW, there was a tripartite connection between the state [in form of a Labor Government and progressive educational bureaucrats], the University and organised labor. At the beginning of 1914, Meredith Atkinson, a young Oxford graduate and protégé of Mansbridge, arrived to take up his appointment as Head of the Department of Tutorial Classes [i.e. Adult education]. So now NSW had a WEA embodying the essential characteristics of the British movement. Soon after the Manbridges' visit to Australia, branches of the WEA were established in each of the six Australian states with varying degrees of initial and continuing success. At the WEA Dave Stewart, was soon joined by Meredith Atkinson, who, in addition to his University position, became the President of the WEA.

The controversies

World War 1 was about to complicate matters. Atkinson, a true British Empire patriot, threw his considerable oratorical skill and crusading energies into the war effort, more specifically, the fight to introduce conscription for frontline service, in the Great War. He soon became the Secretary of the Universal Service League. His actions enraged the officials of the militantly anti-conscription trade unions. They began to withdraw their support from the WEA. Though the WEA, which supported Atkinson's right to hold and to act upon his own political opinions, survived this crisis, it was much weakened, in terms of organised working class support. From then on, it would need to be more reliant on the goodwill and support of the university and the state government if it was to survive.

In 1935, in the depth of the Great Depression, another fundamental dispute erupted within the WEA. Dr. Lloyd Ross, a long time WEA activist and university adult educator, believed that the time had come for the WEA to abandon its impartiality and to stand with the working class in the economic current crisis. This matter came to head at the special conference of the WEA held in Sydney to resolve this question. After a lengthy debate, the conference voted narrowly to defeat the proposition put by Ross that the WEA should give up its claim to be a non-partisan body and adopt a policy that would achieve a socialist state through education. Ross left fulltime employment in adult education – he was the Assistant Director of Tutorial classes [i.e. Adult Education] at the University of Sydney – to become the Secretary of the Railway Workers' Union. His parting words were, "I will be doing what I have urged the WEA to do, to link knowledge with action".

Finally, during the Second World War, when the USSR was one of the Allies opposing the Axis powers, the "B40 Affair" blew up. B40 was the serial number of a course, "Political Theories and Movements", which contained content critical of life in Stalin's Soviet Union. This position outraged many on the far left in the labor movement, and given the USSR's current heroic struggle against the common enemy, Nazism, this was generally not a popular position to take in wider

labor circles. A pamphlet, called "The WEA Exposed", was published and widely distributed. This claimed that the WEA was controlled by a group of non-labor, anti-Soviet, Trotskyist intellectuals from the university. Again, while the WEA survived, many unions disaffiliated.

If, in Australia, the organised working class were often in conflict with the WEA, who then were the students of its classes and its long term activists? Increasingly, they were the members of the progressive middle class, the advocates of social reform [in sexual matters, the rights of women, national efficiency, economic development, conservation, etc.], and increasingly they were women. By the time the WEA had entered the second half of the twentieth century, it had shifted from being principally involved with workers' education to being largely involved with the provision of high quality liberal adult education to the general community. How and why did this happen?

Some partial explanations

A number of partial answers can be proposed that help to explain this situation, this shift in emphasis.

- Those on the far left firmly believed that the WEA had always been a creation and a creature of the ruling class. The Association's acceptance of government funds and its close alliance with the university were just the most visible signs of this class collaboration. As the labor movement became more divided and the forces of left sectarianism grew, the WEA became one of the sites of the battle for control of the labor movement. This was especially the case in the early post WWll years, as Catholic Action and the Communists, as well as the more moderate centrists, struggled for the control of the labor movement and its institutions.
- As the potential power of the growing organised labor movement became recognised by the forces of big Business, including the mass media, it became essential, it was thought, if the capitalist system was to survive, that the labor movement be tamed and brought into the mainstream. To many in the business community, the WEA was seen as an appropriate vehicle to achieve such

integration and hence worthy of their support. There also was a belief that in the interests of "national efficiency", there needed to be a way for at least some "clever" workers to get an education and a chance to climb the corporate ladder.

- At that time, there was such a general need of, and a strong demand for, educational opportunities across the broad adult population [almost every Australian adult was under-educated] that members of all social classes, and more particularly women, were soon enrolling in WEA classes. The WEA/ University partnership soon became *the* general adult education provider for the wider community.
- Moreover, WEA activists were increasingly of a type. They were [no matter whether they were moderate unionists, left liberal activists, university faculty, civil servants, or progressive businessmen] predominantly members of the professional, university-educated middle class. As the WEA developed it faced attacks from both the left and the right. In general, these difficulties were increasingly resolved in the direction of a more centrist generalist adult education provision.
- As time passed and educational reform began to take hold, more opportunities became available for members of the working class to gain a better mainstream access to "for credit" education at both the school and post school levels Hence, if the organisation was to maintain enrolments, in its largely non-credit, non-vocational classes, it needed the more middle-class general interest learner or at least a working class learner, who had middle-class cultural aspirations.
- Once the WEA was established as an ongoing operation, with a small paid staff and rented premises, it like all organisations sought to continue, and to survive. To survive, it had to have a stable income, and that meant, a stable student body. Individual members of the working class provided some students but not that many. The organised working class could have provided many more but there were ideological difficulties with some unions, educational differences with others, and, in reality, some union leaders did not desire a well-educated, more questioning and

active membership. In such circumstances, a better educated, more middle-class membership provided a much more stable student body and a much improved chance for the long-term survival of the Association as a viable organisation.

The inherent difficulty

However, underlying all of these partial explanations for the decline of working class participation in the classes offered by the WEA, there is a more bedrock explanation, which has to do with the foundational beliefs of the WEA. Now, while not all members of the WEA fully accept this set of beliefs, they remained as an important part of the core beliefs of a very significant group of WEA activists.

These values had to do with the question of standards and, more specifically, the linking of WEA's educational provision with university education. In line with this point of view was the reluctance of the Association to abandon its principle of "complete impartiality" and, "to adopt a position of educational leadership for, and solidarity with, the working class". This was a crucial factor in the loss of organised working class support. This argument was well developed, more than 70 years ago in relation to the WEA in Sydney, by the long-time WEA activist and "grand old man" of the Australian labor movement, Dr. Lloyd Ross. The principal features of his argument, as to why the WEA failed to fully engage with working-people and their movement, can be summarised as follows.

The tutorial class, taught by a university lecturer, was the traditional approach of the WEA/University partnership. This method aimed: at quality, at achieving higher [i.e. University level) standards of education. While this approach had a place in the education of workers, Ross argued, there must also be classes for those who wanted to know – but who read only a little, seldom spoke, and never wrote. Education must be available to all adults from the most humble to the most able. There must be a full range of activities available to the intending student. There should be a pathway, which allows those, who wish, to go from workers' education classes *to* a workers' college and *then on* to the university. Moreover, the workers' education movement would never be complete until it recruited its

teachers and leaders from its own ranks. Even without a university education many adult workers were more than capable of teaching their fellows. This they should be permitted to do.

The catch-cry, of those who opposed Ross' propositions for a more egalitarian view of education was 'standards' and the importance of maintaining them. Ross had little time for such ideas. Standards could, and should, be set up, not as barriers to separate the few from the many, but as stages in the progression of all to a fuller and better life. The class in workers' education must be a clearing station for ideas and not a terminus. The aim should not be to confuse the worker/student but to assist them to grow and to take more control of their lives.

Ross, like many other observers, was deeply troubled by what he saw as a drift away from the social towards the individual in the classes offered by the WEA. It was *not* the job of workers' education to provide vocational education, or opportunities for the more ambitious workers to advance themselves socially or avenues for workers to escape from the reality of their daily lives. Yes, there was a need for such wider sorts of adult education. There was a need for vocational, community, cultural and even recreational desires to met by adult education. The WEA was not to be criticised for widening its scope to become a general-purpose provider of adult education. But this did not excuse it for failing to fulfill its essential purpose, which was the adult education of workingmen and workingwomen

What was required from the participants [both teachers and learners] in the WEA was an understanding of social forces, a participation in the struggle for social improvement, and a recognition that that the fulfillment of personal desire rests on a renewal of society. These, not academic pleasure, not vocational competence, not personal social advancement or romantic escapism were the true purposes of adult education if it was also to be truly workers' education.

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This paper was largely written from my knowledge of and experience with the WEA and as such lacks the more usual formal footnotes and

references. However, there are a number of books and papers that deal with the WEA and the issues raised in the paper. A listing of those most relevant to this paper follows:

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About the author

Roger Morris *retired as an Associate Professor in the Adult Education Program at UTS. He was a longtime member of the National Board of ALA [1987-2008], serving the Association as both the National President [1996-1999] and Secretary for most of the balance of his term on the Board. Roger has been active in a range of other community organisations including as the President of both the Sydney Mechanics' School of Arts and the Association of Mechanics' Institutes and Schools of Arts in NSW; and Vice President of the NSW Council on the Ageing. He was appointed as a member of the Order of Australia [AM] in 2008 for his services to the field of adult, continuing and community education.*

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Adult Education Conferences in 2013 – reviews

16th annual AVETRA Conference
VET research at the edge – training for diversity and change

3-5 April
Fremantle, Western Australia
http://avetra.org.au/annual-conference/abstracts-submission

In April 2013 I attended the 16th annual AVETRA conference, enticingly entitled *VET Research at the Edge: Training for Diversity and Change*. As someone who until relatively recently engaged for the most part in research and with academic communities in the 'north' in the UK, Europe and North America, the directive to "Book early! WA flights and Accommodation are in high demand" accompanied by an image of a beach of pure white sand edged by a turquoise sea and bounded by a deep blue sky, was indeed inviting. I had never been to that particular edge of Australia, facing the old trade shipping routes to the 'north'. And the line-up of keynote speakers ranging from esteemed professors and educational consultants from North America, Europe and Australia and key leaders in the field of VET practice suggested a thought provoking mix of ideas and challenges for the sector. I booked my hotel and flight!

The conference indeed did prove to be an edgy and engaging event. Participants had come from all parts of Australia. They were also from a range of locations and levels of involvement in research, policy and practice in the VET or university sector or state and institutional policy development and implementation. There was something for everyone. New researchers were well supported. Sessions on completing research projects and getting published were well attended and the latter revealed the depth of reach of Australian researchers into academic publishing communities beyond the "Edge". At the same time, discussions and responses particularly to keynotes and the final panel session showed that the AVETRA conference is a community where researchers not only debate new work with their peers, they also form a learned society that can articulate and voice concerns for the diverse profession of VET researchers and practitioners.

Diversity and change were the main themes of the conference. Not surprisingly, many papers addressed equity and pathway issues within VET and between VET and schools, and VET, universities and workplaces, by examining VET policy and practice and the challenges of growing learner diversity and disadvantage. Indigenous perspectives were foremost.

The need for new creativity was well summed up by one paper, which called for a rethink of pedagogic innovation and a turn to negotiating 'in-between' spaces. There was recognition of the impact of global movements of people, shifts in labour markets and global concerns about sustainability. A number of papers addressed these themes with new empirical research that revealed the specific characterization and important differences in how these globalizing phenomena 'touch down' in Australia.

For a conference well attended by people in such a diverse range of positions in the sector, papers on the state of the profession and future directions were well received. I came away with the take-home message, don't judge the impact of the profession on VET research by its size. This was a vibrant and enjoyable conference, which welcomed all participants into the community. And whilst many individual

participants may research and practice their profession in locations that might seem to be located on the "Edge", the presentations demonstrated they had much to say to those beyond.

Finally, in case you're wondering, I can also recommend swimming at sunrise from that beach in the promotional advert.

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United Association for Labor Education (UALE) Conference Across boundaries: What are workers saying and doing?

17-20 April
Toronto, Canada
http://uale.org/conference/conference-2013

The United Association for Labor Education (UALE) Conference in Toronto this year was a different Conference to the ones I mostly attend. It is different in that it brings together educators working in unions, university labor (outreach) centres, community organisations, along with academics and researchers. It has a preoccupation with north America as might be expected but there is an interest in hearing from other countries experiences.

In a number of American universities there continues to exist 'labor centers' that essentially have an outreach function for workers and unions in those communities. These are not usually academic centres as we know them in that they primarily provide contracted services (training, education, community research) for local unions. An example of one of these is the University of Wisconsin's School for Workers, which presented a film *We are Wisconsin* and discussion

on the occupation of the Wisconsin state legislature 2012. Many of these centers have been threatened with cuts and closure over the past decade and some have disappeared but many continue to operate largely due to the strong community connections and support they have built.

There are also a number of non-union, but union-like organisations that work in the areas of housing, immigration, ethnic and worker rights that attend and bring to the Conference their experiences of community organising and education. The Toronto Workers Action Centre, which is involved in a large scale Anti-Poverty coalition campaign, is an example of this type of organisation. And there are also a number of Unions attending that conduct significant education programs, as well as University labor studies programs.

This year's Conference had strands on labor and popular education and pedagogy, labor research, union-community campaigning and organizing, coalition building, migration rights, arts, workplace literacy and numeracy, a strand on higher education faculty associations and other related areas. In both the US and Canada there is no national union of higher education workers, nor even of academic staff, while in some states it is illegal for higher education workers to go on strike.

Each year the Conference takes on some of the flavor of the host city. This year's was held in Toronto and the Canadian influence was obvious and welcome. The arts played a prominent role with a display of paintings and crafts, song featured through the three days and drumming and dance and performance was a highlight of the Conference dinner. A number of walking tours were included in the program enabling visitors to wander together and learn about labour history and the settlement experiences of Jewish and Asian immigrants.

A strength of the Conference is that it combines practitioner expertise, where I enjoyed participating in some very interactive popular education sessions, and academic work which contributed to the scholarly journal.

In 2014 the Conference will be held in Los Angeles (26-29 March) and hosted by the UCLA Center for Labor Research and Education. The Center, which Governor Arnold Schwarzenegger tried to defund, unsuccessfully, for eight consecutive years, will also celebrate its 50th anniversary at that time.

There are a couple of reasons why UALE in Los Angeles will be particularly interesting. Los Angeles is the at the heart of the US Immigrant organizing movement that burst into public attention with the 1 million strong May Day march in 2006. Today is central to organizing around the Dream Act, which has the potential to change the status of up to 11 million undocumented workers / immigrants in the US.

The effect and impact of the movement, known as the 'Dreamers', is now being felt in the broad labor and social movements and it has brought to the fore a generation of new young leaders.

The Conference will also have a focus on American – Asian worker links. The Los Angeles Labor Center was instrumental in getting the Asian Pacific American Labor Alliance (APALA) off the ground and it hosted a few years ago the First National Asian Pacific American Workers' Rights Conference, and the 2014 Conference will include Asian region organisations. There are important educational and organizing lessons to be gained from closer attention to these efforts.

As America's 2nd largest city and most important Pacific port Los Angeles has obvious connections with east cost Australia and the Asia-Pacific. Developing closer ties with US labor education centers, unions, popular education and community organizing initiatives along with Asian worker organisations, provides a rich source of ideas for Australian educators in unions, popular and community organisations and university researchers.

The opportunities for Australian educators to learn and develop labor and popular education pedagogies are limited in Australia. UALE offers interested researchers and practitioners access to North American and Asian labor educators, organisers and campaigners and through listening, observing and presenting on the range of

campaigns and organising taking place in Australia those connections can be strengthened.

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53rd Adult Learning Australia (ALA) Conference in partnership with ACE Aotearoa.

Confident Communities – Hāpori Tū Rangatira

3-5 June
Wellington, New Zealand
https://ala.asn.au/professional-development/conference/

ACE Aotearoa and ALA partnered for the first time on a joint regional conference held in June of this year in Wellington. The theme was *Confident Communities -Hāpori Tū Rangatira*. A powerful feature was the synergy in message between the three keynote speakers who were elders and leaders from three different countries, and three different cultural backgrounds.

Dame Iritana Tawhiwhirangi (Ngati Porou, Ngati Kahungunu, Nga Puhi) is a leader in the Kohanga Reo (Language Nest) movement in Aotearoa (New Zealand). She opened the conference with a message of 'Fanua' (family) education first, a theme that was then reinforced throughout the rest of the conference by other speakers. She spoke of the challenges of creating public policy that supports adults to nurture and educate their children, and the unfortunate, often unintended, consequences of public policy that seeks to separate out children from their families for the purpose of education.

From the other side of the world, Dr Michael Omolewa, a distinguished professor of the history of adult education at the University of Ibadan, Nigeria gave a similar message. He told the conference about 'book people'; young Nigerians who had been specially selected for western education, which left them with new skills but separated from their language and culture and made mock of by the communities they had left behind. It was an extremely powerful image of the potentially colonizing impact of ill thought through adult education.

A third leader, Tony Dreise; a Kamilaroi (*Gum-ill-roy*) man from eastern Australia, PhD scholar and educational policy adviser talked of the ingenuity and enterprise of the mission life of his mother's childhood. He posed the question of how this same community, like so many former mission communities across Australia, are now sites of rural poverty, low educational outcomes, and public buildings which house no educational, learning or cultural activities in one of the wealthiest countries in the world.

Tony also spoke of the obsession of policy makers with narrowly prescriptive outcomes to the point where common sense notions such as the impact of an adult's attitudes to education on their children's success with education can be ignored while desperately marginalised communities are offered "more pilots than Air New Zealand."

The conference workshops followed what in Australia we might call 'Both Ways' education. Each workshop topic was conducted from an Australian Indigenous perspective, and a mainstream Australian perspective, from a Maori perspective, a Pacifica perspective and a Pakeha (New Zealanders from European backgrounds) perspective. There was also a stream that looked at each topic through an international lens.

A number of participants talked about how this approach allowed them to position their practice as adult educators in a broader context. For those of us from a European background, it was a timely reminder of the areas in which western education is the 'odd man out' on how information and knowledge are passed on within communities and societies.

For example, the conference inclusion of waiata (Maori song and dance) as a form of education and celebration was unique to Australian participants, but was relatively normative to Dr Omolewa (who shared prayers and song from his own culture) and to many of the international visitors.

All speeches were concluded with a song, and sessions were opened and closed with song. A number of Australians commented on how powerfully this enhanced the learning process.

My expectation of conferences is fairly humble. If I walk away with a few good references to follow up and one new idea, then it's a good conference. If it leaves me invigorated to take on the challenges ahead, then it's a very good conference. *The Confident Communities -Hāpori Tū Rangatira* was the latter kind of conference.

The most important thematic thread was the importance of learning that begins from a focus on families, then communities, cultures and countries in a context where the opposite trajectory forms the basis of policy. Having this message reinforced from three corners of the globe from three such impressive leaders, and having the experience of music, song, poems and prayers as vehicles of learning was invigorating.

ALA is now working with ACE Aotearoa and with Asia South Pacific Association of Adult and Basic Education (ASPBAE) to run a larger regional event in Brisbane in early 2015.

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32nd Canadian Association for the Study of Adult Education (CASAE)

3-5 June
University of Victoria, British Columbia, Canada
http://www.casae-aceea.ca/~casae/sites/casae/files/2013_CASAE_Proceedings_0.pdf

Studying adult education in Canada

The Canadian Association for the Study of Adult Education (CASAE) held its annual conference at the University of Victoria, British Columbia, from June 3-5 this year (2013). Also known in French as l'Association Canadienne pour l' étude de l'éducation des adultes, CASAE is similar to the ALA (Adult Learning Australia) in membership and scope and also sponsors a journal – the Canadian Journal for the Study of Adult Education. Apart from that it appears to be quite different in its aims, structure and funding, and was established 20 years later than the ALA, in 1981. In my first visit to the Pacific North West I attended the conference and presented a paper, and gained some very interesting impressions of current research and practice in adult education in Canada in particular and the Canadian education scene in general.

While registration for the CASAE event was relatively small at about 70 people, the conference benefitted enormously from being part of the much larger annual Congress of the Humanities and Social Sciences, simply known as 'Congress'. Now in its 82nd year, Congress is a flagship event organised by the Canadian Federation for the Humanities and Social Sciences and includes over 65 associations ranging from Jewish Studies to Theatre Research and even Food Studies. The synergy afforded by the combined congress of these associations meant that the University of Victoria was host to around 7,000 delegates for nearly 10 days. The 2014 Congress will be at Brock University in Eastern Canada, and obviously such a large event

is seen as a boon for local institutions wishing to put themselves on the international Humanities and Social Sciences map.

The benefit for attendees like me was a much larger range of activities, events and networks to participate in, including a series of 'Big Thinking' keynotes on social, cultural and political issues; concerts, exhibitions and excursions; and Congress Expo which featured over 50 exhibitors including publishing houses, book distributors and educational resource providers displaying their wares and engaging in book launches, presentations and offering special deals.

The whole package gave me a very positive impression of how well organised and highly valued the Humanities and Social Sciences are in Canada, with a vibrant academic research community that seems to benefit from robust infrastructure, supportive national networks and well-resourced institutions.

This was fortunate as the CASAE conference itself was a bit of a disappointment and struck me as being rather insular and self-absorbed, with very few international delegates (two other Aussies apart from me) and most papers focussing on rather narrow local Canadian issues which often were not that engaging or relevant to big picture world thinking around lifelong learning in the 21st century. Many CASAE members still seem to be engaged in a kind of grass roots community activism mindset, referring to Paulo Friere and mainly focussing on policy and practice around adult literacies. To be fair, this is an issue in Canada just as it is in Australia, especially given the similarities in our colonial histories and engagement with Indigenous people, migrants and refugees. At least the University of Victoria has a very impressive First Nations Building at the centre of the campus which is a symbolic as well as aesthetic reminder of the importance of Indigenous history and culture, which seems to be better assimilated into Canadian society than it is in Australia.

However my impression was that while Canadian adult educators are very aware of what is happening in their own country, they are also very much influenced by the effect of the powerful neighbouring country to the south, to the point that US cultural domination may block out their awareness of any other developments further south in

our hemisphere. European influences and links are obviously there, for example with the UK and Scandinavia and especially the French connection, but I feel that our two countries could learn something from each other in dealing with uncertain futures in the world of adult learning.

One thing we could learn here is the benefit of connecting and collaborating more with other like-minded organisations in the Humanities and Social Sciences in Australia which have a stake in adult education, community development and lifelong learning, for building synergies, networks and sharing resources and events. The 2013 ALA national conference held in New Zealand in collaboration with ACE Aotearoa is a great example of the need to look beyond our own borders and issues to begin to develop a truly global picture of the possible futures for adult learning and how those futures can be shaped.

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8th International Researching Work and Learning (RWL) Conference: The visible and invisible in work and learning

19-21 June
University of Stirling, Scotland
http://www.stir.ac.uk/education/researching-work-and-learning/

The most recent Researching Work and Learning (RWL) conference was held at the University of Stirling from 19-21 June, 2013. The key questions expanding on the theme were phrased as: What knowledge,

which actors, and what parts of the environment are most visible? What and who remains invisible? When do actors become aware of invisible infrastructures? And what research methods and analytical approaches can make the invisible visible? The reference to 'actors' in these questions reflects a growing interest in sociomaterial approaches (a strong feature of research at the host institution), and indeed attention to materiality was a strong current running through many sessions. Czarniawska's opening keynote addressed questions of relationships between human bodies and artefacts of technology head-on.

A show of hands in the first plenary session indicated a good proportion of delegates were attending RWL for the first time. This suggested promise of different faces and ideas becoming visible, and to an extent the full program delivered on this promise. However in geographical terms, the most represented regions were, unsurprisingly, North America, Scandinavia, North-West Europe (particularly the UK and Germany), and Australasia. There was a strong showing of papers from South Africa, but the African continent remained otherwise unrepresented. A smattering of papers from Eastern and Southern Europe, and South-East Asia added welcome diversity. These are not mundane issues, but connect with ways in which the field of work and learning research is developing. Despite the explicit value given to Southern Theory in Cooper's concluding keynote, patterned geographies and theoretical affinities continue to shape the field in particular ways. It is interesting to reflect on how scholars responded to the call to change what is visible in work and learning. Materiality has certainly taken up a more central position, while references to embodiment and affect are emerging. Complexity theory, practice theory and philosophy, activity theory, actor-network theory are now established as key reference points; communities of practice approaches were much less visible than in the past, indicating they have perhaps run their course.

As the key conference questions suggested, attending to aspects of work and learning that have not previously been visible presents a methodological challenge. Several papers and symposia responded

to this explicitly, for example asking how to 'catch' practices and exploring potential of photographic, video and drawing-based methods.

RWL reflects a number of significant developments in the field, as well as maintaining longstanding threads, particularly relating to vocational and higher education policy and how they intersect with questions of pedagogy and work, although less visible now are questions of labour movements and unions. Thankfully it seems the idea that learning may occur without there being a teacher, and outside of educational settings, is no longer at issue. The field has moved on.

What remains invisible? It appears that some contexts remain more popular than others – VET, health work, the professions more generally. I wonder whether the field might benefit from exploring, or perhaps even have a remit to explore, other kinds of work including sex work, domestic labour, organised crime, child labour, self-employment, entertainment, outsourced work such as in call centres, and so on. As a community we appear somewhat reluctant to take ourselves into areas that make us ethically and politically queasy, but I would argue questions of work and learning are not absented from those contexts.

What might RWL9 in Singapore herald? I would predict a continued focus on practice and materiality, and the strong threads of the past to remain a central 'comfort zone'. What would I like to see? Greater breadth of theoretical engagement – not only with so-called Southern Theory, but with Chinese and other philosophies from East Asia and the Pacific. More even geographical representation, particularly with growth of input from sub-Saharan Africa, South and Central America, South and Central Asia, and the Middle East. And perhaps, more explicit questioning of learning. Many of the emerging and recently established approaches draw from theory that is not explicitly educational or focused on learning. This is to be welcomed, but there are risks that learning becomes a 'stop' word: as metaphors of transfer and participation are replaced with ideas of emergence, questions of

what emerges and whether all emergent learning is of equal value and significance remain.

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43rd SCUTREA Conference
Mobilities and transitions: Learning, institutions, global and social movements

25-27 June
Caledonian University, Glasgow
http://www.crll.org.uk/conference/

The 43rd annual Standing Conference on University Teaching and Research in the Education of Adults (SCUTREA) conference was held in Glasgow in June 2013. The conference theme, *Mobilities and Transitions: Learning, Institutions, Global and Social Movements*, afforded an interesting array of papers. Some focused on adult learning in higher education, with several picking up the 'transition' theme to explore transitions into learning programs for non-traditional students. A common thread among these papers was discussion of the complexities of the contemporary socio-political and economic environment. Other papers mobilised the 'mobilities' theme to explore the impact of, and issues relating to, mobile populations and adult education.

Having been to most SCUTREA conferences since the mid-2000s the foci of these papers did not surprise me - nor were the papers that explored adult education in terms of adult literacy, issues impacting marginalised communities, or those that featured social justice

mandates. To my mind these ideas have been among the *raison de etré* of SCUTREA conferences and adult education more broadly. What did surprise me though was a noticeably new thread. This was evident in the number of papers that focused their attention on learning and the media (e.g. TV, Film, Novels). For me these papers exemplify some exponential growth in adult education research.

This shift in SCUTREA papers, mirrors a simultaneous worldwide shift in adult education programs offered in higher education. I see this in my own workplace, as well as in other universities where the vernacular of adult education programs has (or is) shifting to reflect broader concerns (for example vocational, workplace, and professional learning). Some may understand this as the collapse or disintegration of adult education: after all 'adult education' programs are in demise. Could it be that as researchers we have simply 'sold out' – refocusing, instead, our attention to resounding calls for national productivity, global competition and workforce development or other such matters?

There is another way to understand the shift though. This is that the shift represents adult education researchers success in actually 'selling the adult learning message'. Few (if any) would disagree that adults learn in all domains of their lives, and contemporary adult education scholarship reflects this. This understanding also helps to make sense of the current dispersion of HE adult education programs. Could it be that this shift is not a result of the failure of adult education, but rather as its resounding accomplishment?

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15th Comparative Education World Congress 2013
New times, new voices

24-28 June
Buenos Aires University, Brazil
http://wcces2013.com/version-ingles/programme/

In June 2013, Buenos Aries, capital of Argentina, was the venue for the 15th World Congress of Comparative Education Societies (WCEES), attended by more than 1000 delegates from 80 countries. The Conference location was the Faculty of Economic and Social Sciences of University of Buenos Aries, in the heart of the city sometimes referred to as the Paris of Latin America. The Conference languages were English and Spanish, with excellent simultaneous translation provided in plenaries by students from the university.

Each day began and ended with a panel discussion in plenary session. Of these, the standout one for me was entitled *Fifty Years After Angicos - Paulo Freire, Popular Education and the Struggle for a Better World that is Possible*. For an hour and a half, several speakers who had worked with Paulo Freire used the occasion of the 50th anniversary of his first literacy campaign in Brazil to reflect on his work and legacy. One of the panellists was Professor Anne Hickling-Hudson from QUT, who worked with Freire in the Grenadan literacy campaign just prior to the US invasion in 1983. This panel generated spirited discussion, capturing some of the vibrancy of the popular education tradition in Latin America today.

Following the panel sessions, delegates divided themselves across literally hundred of workshops, organised into thirteen thematic areas. The full program can still be accessed at the Conference website. I spent most of my time in the group convened by Professor Daniel Schugurensky and Dr Marco Aurelio Navarro, entitled *Voices from those in adult learning/lifelong learning/nonformal learning*. With up to three papers per session, sometimes in different languages, and many of them from Asia, Latin America and Africa,

it was a stretch to stay on top of the discussion, but it was wonderful to see how informal adult education is still very much a force in the world, with so many people doing grass roots work aimed at changing people's lives.

In our session, for example, where Deborah Durnan and I presented on the adult literacy campaigns in Timor Leste and Aboriginal Australia, the other speakers in the session included one from South Africa critically reflecting on the use of RPL for entry into post-apartheid higher education, a presentation in English from a French doctoral student doing informal education work with an NGO in Mali, and two women from Canada presenting on access programs for minority refugee and immigrant students at a Canadian university.

Perhaps it was the Latin American location, but I found it quite striking that the intellectual centre of gravity at this Conference, in the keynotes, the plenary panels and the workshops I attended, was decidedly to the left of the adult education literature in the US, Australia and Europe. Given recent political developments in Australia, it is encouraging to see that the world is not all heading in a similar direction, and that the voices of radical dissent, which have always enlivened adult education as a discipline, continue to be raised loudly and articulately in many parts of the world.

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Book Review

Popular education, power and democracy: Swedish experiences and contributions

Edited by Laginder, A., Nordvall, H., and Crowther, J.
NIACE, Leicester, 2013

Reviewed by Michael F. Christie
Southern Cross University

Australian Adult Education owes much to the Swedish popular education tradition. The growth of study circles in this country can be directly attributed to the example and democratic efficacy of the Swedish study circle movement. That we have developed our own particular form of study circle and a robust study circle network that has attracted scholarly attention in Sweden (see http://www.studycircles.net.au/) is a compliment to the Adult Education movement in both countries. Sweden's Popular Education movement can take pride in the fact that nearly 70 years of state funding for Adult Education has inspired others. Australia's Adult and Community Education groups can feel vindicated that persistent lobbying and sound logic can attract the attention of politicians and some funding, for what has been characterised, in the past, as a

Cinderella sector. The book under review includes a chapter on the study circle movement in Sweden (chapter six) in which the authors review the way in which study circles began as a means of exerting the power of the people in an undemocratic political system and ended up gaining government support. Power and Democracy, and the way in which Popular Education has helped distribute power and maintain democracy is the common theme throughout this readable, well-presented book. The book has been published by the UK National Institute of Adult and Continuing Education and is distributed by Footprint Books in Australia. The book costs $62 and it is possible to obtain a copy online at http://www.footprint.com.au/academic-categories.asp.

The book is divided into four parts. An introductory chapter in Part I sets the scene and explains the structure of the book. It is a pity that this reader was distracted by some lapses in logic in this early part of the book. The editors argue that Popular Education is attractive to political parties on both the left and the right of the Swedish political spectrum. It is true that the Swedish Centre Party can trace its origin back to a popular education initiative among adherents of the Free Church movement (p5). To claim, however, that 'even among several of the bourgeois parties there is a strong popular movement tradition where study circles and folk high schools have historically been important parts of the parties' cultures' (p7) is taking the argument too far. I would like to see the evidence that demonstrates that the Moderates, for example, who make up the majority party in the ruling coalition in Sweden today, has its historical roots in a popular education movement. There have been wealthy philanthropists who have interested themselves in education for the working class. William Chalmers is one of them and the donation he gave in 1829 to start an industrial school, has resulted in one of Sweden's two premier Universities of Technology being named after him. The General Electoral League (1904-1938), as the Moderate party's forerunner was called, may have included such philanthropists among its number but I cannot find any sources that show the this party had a strong popular education tradition or pushed for greater democracy. In the early part of the twentieth century the General Electoral League voted against universal suffrage and in particular against women's' right

to vote. Sweden is often quoted as the country that first gave voting rights to tax-paying women but universal female suffrage was blocked by the right wing parties at the start of the twentieth century. It was only because the conservatives were in a minority that the legislation passed in 1921, nearly 28 years after New Zealand had introduced such a reform. This lapse early on in the book can be overlooked given the overall quality of the various chapters. Chapter 2 looks at the European Union Commission's strategy of lifelong learning and how Popular Education can facilitate that strategy. There is certainly a great deal of rhetoric coming out of the Commission on this topic. In cash-strapped times however, it is still uncertain if there will be money to support lifelong learning for all, despite an apparent shift away from 'a hard-boiled neo-liberalism' towards a more 'inclusive liberalism' within the EU parliament (p28).

Part II of the book looks at the history of Popular Education in terms of the its conceptual origins; the ways in which it has empowered women; and, the variety of its folk high schools and their potential for advancing avant-garde directions in adult education. Bernt Gustavsson's chapter on 'Bildung' (chapter three) is important since this German word is the root for the Swedish term 'bildning'. Gustavsson's efforts to tease out the origins of 'bildung' and the emergence this concept in the educational philosophies of both Humboldt (1769-1859) in Germany, and Grundtvig (1783-1872) in Denmark, are important. The two words, however, are hard both to translate and to explain. A 'bildad' person is one who takes responsibility for his or her own learning, who goes on learning throughout life, who is analytical and reflective but also creative in the how and when and why of learning. When the word 'bildning' is combined with 'folk' we get in Swedish 'Folkbildning' which translates roughly into 'Adult Education' or 'Popular Education' or even in formal tertiary settings, 'Liberal Education'.

The fourth chapter is entitled 'Popular Education and the Empowerment of Women' but its author's thesis, which includes an historical perspective, is mainly about dis-empowerment. Kerstin Rydbeck argues that the term 'folkbildning' referred, in the nineteenth century, to a patriarchal ideal advocated by a male social

elite for the benefit of the disadvantaged. The people or 'folk' were seen as passive recipients of education, not the sort of self-actuating learners that I have described above. This changed during the late nineteenth and early twentieth century, as working class men and women in both the labour and the temperance movements took greater control of their lives via study circles. Rydbeck's chapter is a powerful antidote to the notion that 'folkbildning' involved all of the people equally. She shows how women have been marginalised and forced to develop their own forms of popular education, especially in the 1970s, in order to resist a continuing patriarchal impulse in Popular Education. She also argues that as state subsidies increased so did the tendency to control who received them. She concludes that many women's organisations 'voluntarily or involuntarily wound up outside the structures of popular education' and only received the crumbs of the $350 million dollar pie, that the Swedish National Council of Adult Education handed out in 2011 (p68).

The following chapter on Swedish folk high schools, or adult residential colleges, will interest educators in the tertiary sector for a number of reasons. The historical origins of the schools are succinctly sketched and their variety and ability to provide educational innovation described. Staffan Larsson, the chapter's author, does not mention that according to the legislation governing folk high schools, it is illegal to grade students. Graduating students receive a certificate of completion and a written 'intyg' or statement about the quality of their studies but no 'betyg' or grade. The lack of grading and hence the diminution of competiveness has, in my opinion, allowed for some of the avant-garde initiatives that Larsson argues are available in this form of education in Sweden. I have witnessed first hand how learners and their mentors cooperate to develop their own experientially based, shared learning experiences. Larsson sees a threat to the movement both from politicians and from the students themselves. On the one hand politicians want to bend a tax-payer supported institution to its own purposes while students, especially the good ones, want a more formal, graded assessment that offers a better path into further studies or future jobs. Both pressures threaten to draw this type of Popular Education into a more formal mainstream. Larsson ends on a note of optimism however, saying that to paint too

gloomy a picture of the folk high schools' future is unwise because 'they have always been able to find unexpected solutions to problems and (the) means to deal with them' (p92).

Part III goes to the heart of the issue in that it analyses, in a series of chapters, the relationship between Popular Education and Power in Sweden. Chapter six (as mentioned above) looks at study circles and the ways in which they, in their original form and in today's more formal manifestation, have provided a means for people to learn together in a democratic way while at the same time furthering the ideals and practice of democracy. The seventh chapter looks at the interaction between the global justice movement and Swedish Popular Education. The author, Henrik Nordvall, focuses much of his attention on the activities of the ABF, a study association that has some similarities to the anglo-saxon Workers Educational Association. He uses the results of his PhD to show that although the ABF made significant headway in the mid twentieth century, its interaction with the movement for global justice declined toward the end of that century and still languishes today in the face of what he calls the 'capitalist crisis' (p142). Ali Osman contributes a chapter on migration policy and how it has developed in Sweden. The chapter is called 'Popular Education in the service of integration: Empowerment or internalization of the dominant cultural ethos?' One of the interesting aspects of the chapter, from an Australian standpoint, is the fact that in Sweden a policy of multiculturalism was introduced in 1975 but subsequently replaced by a policy of integration in 1997. This runs counter to what happened in Australia where an assimilation policy gave way, over time, to a policy of multiculturalism. Osman's answer to the question he poses in the chapter heading is that Popular Education cooperates with immigrant associations 'to shape, sculpt, mobilize and influence the choices, desires, aspirations, needs, wishes and lifestyles of individuals and groups with specific goals' as part of a normalization project (p165). In other words Popular Education is used as a means or assimilating migrants into the mainstream of Swedish law, labour and society. Berit Larsson's chapter, which follows, complements the earlier one by Rydbeck in that it looks at the Women's Folk High School, the only folk high school out of the existing 150, that caters solely for adult women and transgender

persons. The school began in 1985, is subsidized by the government, and has provided short and long-term courses for over 10,000 women from diverse backgrounds for the last 38 years.

Part IV of the book provides an interesting overseas comparison by looking at Folk High Schools in the United States and Tanzania that have been inspired by the Swedish tradition. It also provides a chapter that analyses the impact that the Scandinavian model of Popular Education has had on Adult Education and lifelong learning in Japan. In the final chapter Jim Crowther, who coordinates the international Popular Education Network (PEN) compares and contrasts how popular education in the UK and Sweden has changed over time. Crowther refers back to the dilemma of defining Swedish popular education as 'popular' when it is largely supported by the state. Overall his chapter is a well-written reflection that sums up some of the main themes of the book, including a need for Popular Education in Sweden 'to guard against trends towards a market-state' (p272). After researching Swedish Adult Education and after living in that country for 13 years, I am still in awe of the extent and efficacy of such publicly subsidized education. But I am also more aware of the fact that Swedes themselves can, at times, be complacent about what they have created. The danger is that there is, as Kjell Rubenson points out in chapter 2 'a fundamental contradiction in Swedish popular education' because it is 'an activity whose charter is "free and voluntary" but which, for its very existence, depends on state subsidy' (p19). What can be given can be taken away, especially in hard economic times. This book, one of the few in English about Popular Education in Sweden, is easy to read, varied and well researched. Hopefully it will ensure that Swedes themselves see what a marvellous institution they have created. It should be recommended reading for all of those involved with Adult and Community Education, for policy makers and for those who care about strengthening democracy by empowering ordinary people.

About the reviewer

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