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Special Issue:
Lifelong learning and sustainable development

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# AUSTRALIAN JOURNAL OF ADULT LEARNING

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# Special issue:
# Lifelong learning and sustainable development
# From the guest editors' desk

Bruce Wilson, Mike Osborne and Robbie Guevara

## Introduction

In 2015, two remarkable decisions were made under the auspices of the United Nations. The first was the adoption of the Global Agenda to 2030, a plan for addressing many challenges shared across nations (see United Nations, 2015a). The second was the 'Paris Agreement', designed to halt global warming and address the threat of climate change (see United Nations, 2015b).

These were unanimous decisions made together by more than 190 nations. Each nation was expected to then implement its own legislation, its own roadmap for making its contribution to addressing these global challenges. The assumption is that governments would commit to legally binding action which fulfilled the obligations made in New York and Paris.

Government action is essential, of course, but is this how the planet will be saved? Of course, there is widespread recognition also that change will have to involve business, research institutes and civil society as well as government. Yes, the threat of legal sanctions and access to

public resources will combine to offer important incentives to change behaviour, but they are unlikely to be sufficient by themselves.

Hence, underpinning so much of the ambition is the assumption that voluntary action will be crucial. In this respect, education, not only formal but also in non-accredited and informal settings, across the lifespan, will be necessary. How will we engage people with the scale of the challenges which we face? How can we inspire them to become part of the solution, rather than obstacles which prolong the threat?

These are fundamental questions which have a degree of urgency about them, given the scale of transformation that will be required. After all, 2030 is only 11 harvests away.

Clearly, schools, universities, technical institutes all have a role to play. However, the vast majority of citizens who make up civil society are not enrolled in any formal educational programs. The work necessary to mobilise people to comprehend the scale of global challenges and then be able to make their own individual and collective contribution will inevitably find lifelong learning at its heart. Of course, lifelong learning, specifically adult learning, varies enormously across the world, even within OECD countries, let alone the developing world. Formal provision counts for only part of the story, and indeed, in many national settings irrespective of wealth and circumstance, informal, self-directed learning counts most in terms of people's experience of lifelong learning.

How might policy to promote lifelong learning develop? Are there particular outcomes which should be anticipated from a year focussed on lifelong learning? How can we mobilise the various stakeholders for formal, non-formal (planned learning without accreditation) and informal learning (as occurs in all kinds of settings whether explicitly or implicitly) across various age levels to work together to promote a more coherent and engaged framework for all people to see themselves on a lifelong learning journey? It is a journey not only for individual benefit, but one that is necessary for a sustainable future for our planet. How do we make sense of it?

These questions set the scene for this special issue of the *Australian Journal of Adult Learning*. What kinds of initiatives contribute to our knowledge about the importance of lifelong learning, and its role in shaping and supporting sustainable development?

## The challenge of the sustainable development goals (SDGs)

The adoption of the SDGs by the United Nations in September 2015 was the outcome of a very extensive process of debate and consultation over several years. The agreement on 17 Goals, each of which was linked with up to a dozen targets and a raft of indicators, was an extraordinary achievement. The SDGs follow on from the Millennium Development Goals (MDGs) and from Education for All (EFA).

The MDGs were adopted by the United Nations in 2000 and had also outlined a program of action to address major global challenges, specifically the halving of extreme poverty. By the end of the target period, to 2015, the substance of several of the Goals had been achieved.

> *... [T]he MDGs have made a profound difference in people's lives. Global poverty has been halved five years ahead of the 2015 timeframe. Ninety per cent of children in developing regions now enjoy primary education, and disparities between boys and girls in enrolment have narrowed. Remarkable gains have also been made in the fight against malaria and tuberculosis, along with improvements in all health indicators. (UN Secretary General, Ban Ki-Moon, in a Forward to UN 2014).*

It was not all good news, as progress across nations was uneven, and limited in relation to some Goals, especially mortality rates. Many issues have confounded the hope for the MDGs, including:

- limitations in the design of the Goals, including in Education, which made no mention of lifelong learning
- the structuring of the Goals as a kind of 'one size fits all' shopping list process, failing to take account of diverse circumstances, governance or cultural perspectives
- insufficient attention to inequality and the principles of equity, partly because of a primary focus on aggregated frameworks
- limitations in implementation and evaluation (see Fehling et al, 2013).

The process of formulating the SDGs learned from the experience with the MDGs. An Open Working Group (OWG) on Sustainable Development Goals was established following the UN Conference on

Sustainable Development (Rio + 20) in June 2012. This prompted a very extensive process of consultation involving governments, international organisations and civil society. It led to the OWG's release of a 'zero draft' in July 2014, with 17 Goals and an associated 169 targets. The final statement of the SDGs was adopted by all 193 members of the UN in September 2015.

By comparison with the MDGs, the SDGs are considerably more ambitious in scope and in the depth of ambition represented in the targets and indicators associated with each Goal. They encompass a comprehensive view of sustainable development, economic, social and environmental, much more extensive than the focus on poverty. Even more significantly, the SDGs apply to all nations whereas the MDGs and EFA were specifically concerned with developing nations. The urgency of the 2030 Agenda has meant that the UN itself has committed considerable resources, not least through each of its agencies, such as UNESCO and the Global Compact (see the UN's online platform, supporting the overall framework for implementation: https://sustainabledevelopment.un.org/).

## SDG 4: Education

One Goal, SDG4, recognises Education specifically: *Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all*. The Goal itself is accompanied by a set of targets as shown below, acknowledging the importance of education as an underpinning for effective participation in local, national and global affairs.

### *SDG 4 targets:*

4.1 By 2030, ensure that all girls and boys complete free, equitable and quality primary and secondary education leading to relevant and effective learning outcomes

4.2 By 2030, ensure that all girls and boys have access to quality early childhood development, care and pre-primary education so that they are ready for primary education

4.3 By 2030, ensure equal access for all women and men to affordable and quality technical, vocational and tertiary education, including university

4.4 By 2030, substantially increase the number of youth and adults who have relevant skills, including technical and vocational skills, for employment, decent jobs and entrepreneurship

4.5 By 2030, eliminate gender disparities in education and ensure equal access to all levels of education and vocational training for the vulnerable, including persons with disabilities, indigenous peoples and children in vulnerable situations

4.6 By 2030, ensure that all youth and a substantial proportion of adults, both men and women, achieve literacy and numeracy

4.7 By 2030, ensure that all learners acquire the knowledge and skills needed to promote sustainable development, including, among others, through education for sustainable development and sustainable lifestyles, human rights, gender equality, promotion of a culture of peace and non-violence, global citizenship and appreciation of cultural diversity and of culture's contribution to sustainable development

4.8 Build and upgrade education facilities that are child, disability and gender sensitive and provide safe, non-violent, inclusive and effective learning environments for all

4.9 By 2020, substantially expand globally the number of scholarships available to developing countries, in particular least developed countries, small island developing States and African countries, for enrolment in higher education, including vocational training and information and communications technology, technical, engineering and scientific programmes, in developed countries and other developing countries

4.10 By 2030, substantially increase the supply of qualified teachers, including through international cooperation for teacher training in developing countries, especially least developed countries and small island developing States

Unlike in the MDGs, promotion of lifelong learning included as part of the Goal in its own right, adding to people's opportunities and quality of life. However, Target 4.7 points to its real importance: it is central to the achievement of the whole 2030 Agenda, as a means of enabling citizens in all countries to understand the context and issues of all Goals, and to develop their capacity to act, if we collectively are to achieve sustainable

development. This is illustrated specifically in articles within this issue.

This draws attention to the collective dimension of lifelong learning. While much of the historical debate has concerned itself with individual circumstances and possibilities for fulfilment, it has become increasingly important to consider the city and community context and resources for learning, reflected in the learning cities/communities movement. Collective learning circumstances often lead to much greater outcomes than those represented by the individual parts.

Learning at any age might not be sufficient to galvanise action, but without the insights into the nature of specific issues, their processes, and how changed individual and shared behaviour can make a difference, constructive change becomes very difficult, if not impossible. Too often in many different kinds of initiatives that seek to foster significant change in the world, learning is low on the list of priorities and in some cases entirely absent in policy rhetoric. Attention has been drawn to this phenomenon in the case of Smart Cities, in a recent article by Borkowska and Osborne (2017). Somehow it seems there are those who think we will become smart without learning.

## The contributions

The articles which comprise the special issue are diverse, ranging from specific case studies of adult education initiatives, to broader project-based reports on particular programmes and issues, to more general discussions of the theme. Taken together, they provide evidence and analysis which adds to understanding about the design and implementation of a lifelong learning policy that aims to contribute to achieving sustainable development.

***Tony Brown*** leads the special issue with an article commissioned by Adult Learning Australia (ALA) to mark their Year of Lifelong Learning. It provides a brief history of the idea of lifelong learning, and an overview of international and Australian writing on lifelong learning policy. He examines the various threads in thinking about why this is important and sets out to clarify the important elements of a policy strategy to implement a more comprehensive and effective lifelong learning policy. This develops an approach for ALA to campaign for a policy, identifying its key elements, in the face of the challenges to be addressed. He concludes that while voluntary efforts will remain

important, government action and public investment is more important than ever, not least to support participation by under-represented groups. This must support a broader concept of learning, albeit one that includes a skills strategy.

***Jo Neary*** and ***Mike Osborne*** write about a project undertaken with partners in the global south which studies the role of university engagement in achieving the sustainable development goals. While initial discussions of the third mission of universities focussed on market-orientated behaviours of universities, more recently it has been connected to activities that focus on social justice and promoting sustainability. It has been suggested that the third mission of universities in the Global South may be particularly significant in addressing acutely felt issues such as climate change, economic inequalities, food insecurity and urban sprawl. The current paper explores this, and asks whether the quadruple helix (collaboration amongst business, government, education and researchers, and civil society) is visible in their engagement activities. Using a synthesis of case studies developed as part of the 'Strengthening Urban Engagement of Universities in Africa and Asia' (SUEUAA) project, a collaborative research project spanning seven cities (Glasgow; Harare; Dar-es-Salaam; Johannesburg; Duhok; Sanandaj; and Manila), they explore ongoing engagement activities where Universities respond to city demands related to the SDGs. While the universities were seen to address city demands, they often reacted without a network of other influential actors (i.e. industry, local government or NGO partners). This suggests that currently, the quadruple helix is underdeveloped in these cities, and more work should be done in creating closer links.

At a more grounded level, ***Karly Kole*** explores ways in which fairy tales can be used as means of enhancing literacy and affective learning skills with a focus on adult literacy learners in further education. Using the underpinning theory of New Literacy Studies, the efficacy of fairy tales is demonstrated through oral storytelling, creative writing, role-play and drama (Author, 2017, pp. 11–13). A programme of work was designed and delivered to included written assignments, questionnaires and case study interviews where participants progress from a literal understanding of narrative text, to symbolic understanding of plot, character, metaphor and figurative language and to a final creative writing piece on a fairy tale of choice.

Kole, like our next contributor, ***Veronica McKay***, focusses on Target 4.6 which identifies the priority of ensuring that all youth and a substantial proportion of adults of both genders achieve literacy and numeracy (United Nations, 2015, p. 21). McKay specifically provides a good example of the way in which education underpins other Goals, specifically those relating to health and wellbeing, gender equality, active citizenship, income generation, and responsible consumption and production. Her article describes how the Kha Ri Gude Literacy Campaign in South Africa extended its literacy curriculum to engender agency and empowerment among adult learners who, as a result of the legacy of apartheid in South Africa, had little or no education. The article shows that by embedding the teaching of reading, writing and numeracy into themes framed by (local, national and international) development agendas, it is possible to impact on the social, economic and developmental opportunities afforded by literacy acquisition. To determine what adult learners considered to be important benefits of literacy, and the extent to which these benefits correlated with the intent of the literacy curriculum inspired by the sustainable development goals, a mixed methods approach was used. The article draws on the responses obtained from a sample 485,941 literacy learners and an analysis of 2,032 educators' monthly journals. The findings reflect a range of impacts including improved self-perceptions and agency, increased community participation, enhanced understanding of health issues, improved income generation and technological abilities, as well as an increased appetite for lifelong learning. It is believed that the findings from the large-scale study will allow for a closer tailoring of basic education programmes in order to connect learning with development agendas.

The world of informal learning is more pertinent to the contribution by ***Tajudeen Ade Akinsooto*** and ***Paul Young Akpomuje***. They examine how people acquire knowledge and skills about informal economic activities and set out to explain why people prefer informal economic activities to other types of economic activities in making a living in the Hausa community in Ile-Ife, Nigeria. This research was undertaken with a view to providing information on how adult informal learning is being used as a means of achieving sustainable livelihood, and, consequently, the United Nations Sustainable Development Goal of ending poverty in all its forms everywhere. The study concluded that despite the fact that the majority of respondents do not possess

the competencies required to participate in today's knowledge and technological driven labour markets, they are still able to use the knowledge and skills they acquired through informal means to take care of themselves and their families. In this way, informal learning becomes a means of livelihood, thereby contributing to eradicating poverty, the first of the SDGs.

The article by ***Trace Ollis*** and her colleagues shifts the focus to the role of community resources in facilitating lifelong learning, and the implications for supporting the SDGs. Neighbourhood houses in Australia are spaces of education and learning that cater to and work with adult learners across a lifespan. They are known as fourth sector education providers in the adult and community education (ACE) sector. With a history spanning nearly 45 years, neighbourhood houses provide vital education opportunities for adult learners. They report on research set against the backdrop of the current project of lifelong learning, which has dominated adult education discourses for more than 30 years. Neighbourhood houses are learning organisations and sites of social inclusion that embody adult learning practices. This empirical research of learners' experiences in neighbourhood houses reveals the complex and varying reasons for participating in ACE that are beyond the realms of formal adult education and include reasons such as decreasing social isolation, fostering friendships and new networks, increased well-being, raising income capacity and further learning to improve employment prospects. The outcomes for participants vary but include greater mastery of English language, improved foundational literacy, numeracy and computer skills, increased understanding of civics and citizenship and Australian history culture and society, while reconstructing previously held negative views of themselves as learners.

***Chunlin Yao*** shares an interest in learning environments in his study of a blended learning environment in adult education in promoting sustainable development. The study analyses the development of blended learning environments in China, and some challenges that the country faces in sustainable development. Based on the analysis of results, the study deduces that a blended learning environment could promote adult education development, reduce the development inequality between genders and geographically, as well as protect nature environments. A survey of adult learners verifies the aforementioned deductions. Adult learners believe that a blended learning environment

is an eco-friendly learning environment; it increases the opportunities for female and those living in rural areas and promotes their sustainable development. The study hopes the research will be beneficial for education policy makers and practitioners interested in sustainable development.

The concluding article, by ***Chris Duke***, returns to Adult Learning Australia's advocacy for lifelong learning, and its ambition to see a national policy adopted. He asks whether ALA's Policy Paper adheres to a mainly economic focus, or whether it favours the emergent 'third generation LLL' vision which reverts to a wider socio-cultural ambition for a healthier society in a healthier environment: that is, something that matches the fine add-on feel-good words of many LLL statements, and rebalances the economic with the social. This means treating what education has to offer in all its forms to support learning in all its forms for the many critical issues, ecological and environmental as well as social, civic and political, that run alongside technological change and the need to equip people for new skills and new employment. Putting it another way: will ALA hitch its wagon to the SDGs and lobby for LLL in Australia to work for all seventeen of these?

## Conclusion

These articles have highlighted how lifelong learning within the context of the SDGs begins with the need to recognise that there are urgent problems that we experience and need to contribute to solving. This recognition is itself evidence of learning; however, this is not sufficient. It is more important for us to learn how to shift this recognition into a commitment to contributing to finding a way to address these identified problems, often very complex and multi-layered in nature. This complexity underpins the importance of a new literacy, beyond basic literacy (read, write and arithmetic) plus IT literacy, which is very much what Paulo Freire has argued for, a literacy that allows us to learn not just to read the word but to read the world.

Reading the world requires that we are able to not just recognise the problems, but that we are able to examine the underlying causes of these problems and a vision for how to address these problems guided by a vision for achieving sustainable development. The SDGs provide us with a framework to guide the learning and the action needed. While there is

a need to learn about the different issues addressed by the SDGs, such as poverty, gender inequality, climate change, and pollution, the articles have shed light on the need for these actions to be supported by the range of sectors, including the government, the private sector, education and civil society. In particular, the articles have identified the roles of the range of academic institutions in supporting learning and advancing the values of lifelong learning, to include the formal educational institutions, such as universities, to the non-formal learning centres such as neighbourhood houses.

While there is a recognition of the role that a strong policy framework is necessary to advance the practice of lifelong learning, at the heart of the practice is the need for individuals to recognise their capacity for ongoing learning at different stages of life. This is not just across age but across the roles that we play, such as students, parents, workers, employers and in a variety of civil society roles.

In the end, the SDGs are an opportunity for us to have a global conversation not merely about understanding global problems, but also about acting at the local level, and learning to work together more effectively. At the core, lifelong learning highlights the need for us to become active citizens. After all, the SDGs will not just be achieved, we all have to make the SDGs come alive as guides for collective learning and action.

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Australian Journal of Adult Learning

# Call for papers for a special issue on: Adult learning, social movements, popular education and the power of knowledge

***Guest editors: Dr Cassie Earl (Bath Spa University, UK); Dr Kai Heidemann (University College Maastricht, The Netherlands); & Dr Ravi Kumar (South Asian University, India).***

In this special edition we seek contributions from scholars at any level of their career who are working on the interrelated topics of social movements and popular education. We are especially interested in work that speaks to the question of the power that knowledge can hold for social change in the current age.

We invite explorations, thoughts and provocations on the following, and other, questions:

> *Does engagement in social movements empower groups and individuals to continue to act locally and globally on issues of social justice?*
>
> *What is unique about the educational spaces that emerge from within social movements?*

*What can comparative studies tell us about the place of popular education in social movements in different parts of the world?*

*What counts as popular education and where is it being practiced?*

*How effective are popular education projects in empowering the popular imagination to act on controversial issues? What is the 'pedagogical turn' in social movement studies?*

*How can knowledge itself be a tool of social change?*

*What can the study of social movements and popular education reveal about prevailing political systems and institutional structures?*

*Can knowledge be considered a social movement in and of itself and what might such a conceptualisation achieve?*

*How can we best theorise the intersection of social movements, popular education and questions of knowledge?*

We invite papers on these and related themes from international contexts, and from activists as well as scholars. We would like the special edition to showcase the work of emerging scholarship from around the globe, encompassing different approaches and perspectives on these topics and alternative ways of theorising them. We would particularly encourage partnership work between activists/popular educators and theorists in order to really understand the terrain of movements for change and their theorisation in order to further and robustly connect activist and popular educators with academics to create a vision of praxis for future movements and projects.

Academic papers (approx. 6500 words) will be blind double peer reviewed.

Practice based papers from activists and popular educators (these may be shorter than the peer reviewed articles) will be reviewed by the special editorial group of this special edition.

***Please refer to the submission guidelines on the AJAL web site: https://www.ajal.net.au/peerreview/index.php/ajal/about/submission***

*Australian Journal of Adult Learning*
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# Lifelong learning: An organising principle for reform

Tony Brown

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## Introduction

Lifelong learning (LLL) is not a new concept. The idea of learning throughout life has been present in educational thinking since Plato. However, as a guiding principle for integrating educational efforts, it is a much more recent development.

For much of the twentieth century, education systems in the West remained fairly stable, generally providing compulsory schooling for most and maintaining small higher education systems as the preserve of the few.

Lifelong learning returned to the international educational policy stage in the early 1970s when the OECD commissioned Edgar Faure to lead an investigation into the type of education needed for a future oriented society. The end of the long economic boom following World War II was commencing and questions were being asked about the long-term sustainability of the world's natural resources. Faure's report *Learning to be: The world of education today and tomorrow* was followed twenty years later by a second landmark report *Learning: The treasure within* by Jacques Delors. By the 1990s, there was a growing consensus around the

need for a new overarching policy framework for education. In 1996, the European Union (EU) created the Year of Learning, and the newly elected Blair Government in the UK introduced its 'Learning Revolution'.

However, by the early 21st century, much of the original, humanist lifelong learning optimism that saw a future-oriented education as about serving something much broader than a narrow economic outcome, had been gradually replaced by emphases on the 'knowledge economy', national productivity and innovation agendas (see Rizvi, 2017). The slide in focus supports Dehmel's argument (2006, p. 49) that lifelong learning policy has been 'an elastic concept tailorable to any needs'.

In Australia, initial interest in a lifelong learning policy agenda quickly receded and little development occurred through the 2000s. While major reviews of early childhood education, schools, universities and vocational education were undertaken; lifelong learning was put in the 'too hard' basket of national education policy.

In 2018, Adult Learning Australia (ALA) promoted a Year of Lifelong Learning (YOLL) and renewed calls for a national approach to coordinating the breadth of Australia's educational efforts in the formal, non-formal and informal sectors to help equip individuals and communities to respond to the pressing challenges of the 21st century.

This paper canvasses the rise of interest in lifelong learning internationally as a policy initiative, an umbrella under which other learning policies can be accommodated; examines how interest ebbed in recent years; before considering why and how it should be reconceptualised in Australia. It looks at the experience of other similar countries, noting how some governments withdrew support for lifelong learning, resulting in a decline in adult participation, while in others the process of introducing policy change has been maintained and continues even under the strains imposed by the global financial crisis.

What are the arguments for developing an integrated national lifelong learning policy in Australia? Is this still a policy initiative worth pursuing? Who benefits from expanding educational opportunities and what are the costs of missing out? Is Australia's existing educational framework fit for the purpose of addressing today's and future challenges?

## Lifelong learning: Beginning of the modern view

Before examining the situation today, it is worth casting our attention back to remind ourselves of some context. 2019 will be the centenary of the landmark 1919 British Ministry of Reconstruction Report, the first major government report advocating adult / lifelong education.

The British report was conducted in the immediate aftermath of World War I. Now, a century later, it is hard to imagine the extent of the war's destruction and the scale of the loss of life. In Great Britain, two per cent of the entire population were killed, another four per cent wounded, and twelve per cent of the total population were 'mobilised'. The question looming over the country was how to rebuild a society in the aftermath of such devastation, especially with the loss of such a large number of its young and most productive adults. It would have been understandable for the Reconstruction Report to concentrate its attention on what technical skills were needed to rebuild the country. However, it advocated a broader view.

The Report concluded that '[a]dult education must not be regarded as a luxury for a few exceptional persons here and there, nor as a thing which concerns only a short span of early manhood, but that adult education is a permanent national necessity, an inseparable aspect of citizenship, and therefore should be both universal and lifelong'. The authors went on to say that they did not 'wish to underrate the value of increased technical efficiency or the desirability of increasing productivity'. But that they believed 'a short-sighted insistence upon these things [would] defeat its object.' They wanted to 'emphasise the need for a great development in non-technical studies, partly because [they thought] that it would assist the growth of a truer conception of technical education but, more especially, because it is … vital to provide the fullest opportunities for personal development and for realisation of a higher standard of citizenship' (Ministry of Reconstruction, 1919, p. 55).

Today conditions are very different, but there are still major issues confronting modern societies and the words of the 1919 committee continue to provide wisdom.

## Developing international policy on lifelong learning

The first post-World War II developments of lifelong education (or

*education permanente* as the French referred to it) emerged as a response to early onset economic crises of the late 1960s, and critical assessments of rigid education systems being made by writers such as Paolo Freire and Ivan Illich. Field (2001, p. 4) traces 'the genesis of the concept (of lifelong education) back to the intellectual crucible of the late 1960s'. It was Edgar Faure's groundbreaking 1972 Learning to Be report, grounded in the critiques of the authoritarian, uniform, monolithic and unequal education systems of the time, that re-launched interest in lifelong learning. But more than just critique, it looked to the future as its sub-title, 'The world of education today and tomorrow' suggested. The report proposed lifelong education as an organising principle for educational reform and a means of producing the kind of 'complete person' needed to construct a learning society.

It took another twenty years before UNESCO's *Learning: The treasure within*, was released. It coincided with the European Year of Lifelong Learning in 1996, and stimulated international policy developments and actions to support lifelong learning. Delors' report argued that economic prosperity and social cohesion were both enhanced by lifelong learning, and created the image of four pillars, supporting a future society – learning to know; learning to do; learning to be and learning to live together. These pillars imagined: the mastery of learning tools (*learning to know*); education to equip people to do the work of the future, including innovation and adaptation of learning to future work environments (*learning to do*); education that contributes to a person's complete development: mind and body, intelligence, sensitivity, aesthetic appreciation and spirituality (*learning to be*); and education to avoid conflict or peacefully resolve it, and to discover other people and their cultures (*learning to live together*).

In response to the UNESCO report, the OECD Education Ministers set themselves a task to rethink the roles and responsibilities of all partners – including governments – in implementing and financing the organisation of lifelong learning for all. The EU's lifelong learning policy that emerged was an 'overarching educational reform policy intended to address a wide range of issues, including education, employment and competitiveness' (Lee et al 2008).

In 1997 Britain's new Labour government under Tony Blair launched a 'Learning Revolution', underpinned by a number of national inquiries

(see Schuller & Watson, 2009). *The Learning Age* released by the Education Minister David Blunkett, ushered in a great flowering of policy initiatives, including individual learning accounts; neighbourhood learning development and a national literacy, numeracy and ESOL strategy, which were broad and inclusive (Blunkett 1998). Places not traditionally associated with education programs such as local libraries, museums and galleries, faith centres, and community and health centres were specifically funded because they were the sites where people who had been reluctant to attend formal education institutions were more likely to go. These initiatives to extend learning beyond the formal classroom attracted positive attention in Australia.

### *Lifelong learning in Australia*

Between 1994–1996 the National Board of Employment, Education and Training (NBEET) produced a series of reports including *Lifelong learning: Key issues* (1996). It reported that the goals of lifelong learning should be to not only develop 'a skilled and flexible workforce' but also to enable people to realise more of their individual potential; and with 'public learning' to enhance societal awareness and understanding of various critical issues in public policy' (NBEET, 1996, p. 4).

During that same period, an independent Australian National Training Authority (ANTA) was established in 1992 to provide advice on and support for the emerging national training framework. Its initial focus was squarely on vocational education and training (VET) but by the end of the decade it had broadened its view to include lifelong learning. It produced a large-scale national survey and 'marketing strategy for skills and lifelong learning' in 2000, however, it was a short-lived approach as the federal government made clear that its policy focus was solely on VET. ANTA was eventually disbanded and merged into the Department of Education and Training.

Also in the 1990s, the Senate held two national inquiries into Australian adult and community education (ACE). ACE's standing as the (educational) sister left behind was reflected in the title of the 1991 report *Come in Cinderella: The emergence of adult and community education*. A second senate inquiry, *Beyond Cinderella: Towards a learning society*, followed six years later. ACE experienced a short-lived boost in recognition and state government funding, notably in NSW and Victoria,

through the later 1990s, which also contributed to the development of a national education and training market. Initiatives such as the Ministerial Council Statement on ACE (DEEWR, 2008), support for Adult Learners Week (ALW) and ALA's 1999 national seminar on lifelong learning were examples of this 'time in the sun'. Local initiatives such as the 'learning towns' spread, research centres in lifelong learning were established at a small number of Universities (e.g. University of South Australia, University of Canberra, University of Ballarat) and individual researchers progressed ideas on how these initiatives could be integrated in a stronger policy framework (see Kearns, 2005).

Following this rise in interest in lifelong learning in Australia, which occurred on the heels of the European and then UK initiatives, policy momentum stalled at both the national and state level. One of Australia's leading researchers in the field concluded that 'in the absence of major structural change, lifelong learning is likely to remain in the "too hard" basket of national education policy and the needs of individual learners across their lifespan will not be addressed' (Watson, 2004). Policy was becalmed.

By the beginning of this century, federal and state governments' attention was primarily concentrated on creating an education market for VET and in increasing student numbers in higher education. Between 1989 and 2016, the number of students at university trebled from 0.44m to 1.46m (Department of Education and Training, 2016). In the VET area, the introduction of market mechanisms through the contestability funding framework has seen a number of private providers collapse and shaken the faith in the integrity of the vocational system, leaving the public TAFE system under-funded and at risk. At the same time state governments have largely withdrawn from funding community-based adult education providers other than through a narrow range of specific, targeted programs.

The ebb and flow over the past four decades can be broken into four periods. Dehmel (2006) identifies the first three as a peak phase from the early to mid-1970s, followed by a 'valley of decreasing interest (mid-1970s to early 1990s), and then a second peak phase of lifelong learning (early 1990s to early 2000s).

The fourth period, which started in the mid-2000s, has generally been one of policy stasis, and in the adult education field, policy retreat.

The result has been mismatches between policy rhetoric and funding commitments, and secondly, between rhetorical support for but neglect of adult education provision (see Field, 2006, p. 29).

### *Lifelong learning in Europe*

In Europe, work moved from advocating for lifelong learning to working on how to bring it to life. In 2000, the European Council of Ministers adopted the Lisbon Strategy (European Parliament, 2000), which was succeeded by the Europe 2020 strategy. In early 2008, the European Parliament passed a resolution on adult learning: *It is never too late to learn*, and subsequently passed a 'renewed European agenda for adult learning' in 2011[1]. The updated resolution was part of the policy commitment to 'the Europe 2020 strategy for smart, sustainable and inclusive growth (which) acknowledges lifelong learning and skills development as key elements in response to the current economic crisis, to demographic ageing and to the broader economic and social strategy of the European Union'. It understands adult learning as a broad, inclusive area comprising 'formal, non-formal, and informal learning; it can be for employing basics, for obtaining new qualifications, for up-skilling or re-skilling for employment, for personal growth, or just for pleasure' ... 'It is essential for employability and competitiveness, social inclusion, active citizenship and personal development. The challenge is to provide learning opportunities for all adults, throughout their whole life, especially disadvantaged groups who need them most' (European Commission, 2010).

The European strategy was framed by the ongoing economic and social impacts of the global financial crisis. It highlights the major role that adult learning could play in achieving the *Europe 2020* goals, by 'enabling adults – in particular low-skilled and older workers – to improve their ability to adapt to changes in the labour market and society.' It builds on earlier foundations that see adult learning as providing 'a means of up-skilling or reskilling those affected by unemployment, restructuring and career transitions, as well as makes an important contribution to social inclusion, active citizenship and personal development' (European Union, 2011).

[1]The Europe 2020 Strategy uses the term adult learning to cover 'the entire range of formal, non-formal and informal learning activities — both general and vocational — undertaken by adults after leaving initial education and training'

Drawing on a survey of scholarly literature, Vargas (2017, p. 4) summarised the four main purposes of lifelong learning developed over the past forty years as promoting economic development and employment; social inclusion, cohesion and democratic participation; personal growth and self-fulfilment; and cultural development and enrichment.

## Facing the educational challenges in contemporary Australia.

Australia is currently facing a number of changes and challenges. With them comes the question as to whether the existing post-school policy framework is fit for purpose, and ready to assist in equipping people to meet them.

These changes and challenges include:

- A changing demographic profile including an ageing society.
- Changing world of work.
- The environment and climate change.
- Increasing inequality.
- Physical and mental health and well-being.
- Reconciliation of outstanding issues between non-Indigenous and Indigenous Australians.
- Imbalance between capital city and regional development.
- Disengagement and disillusionment with the political process, and the need to continually support civic awareness and engagement.

In August 2018, Australia's population reached 25 million people (ABC, 2018; ABS, 2018a). Half of these people, 12.5 million, are in the labour force and another 0.71 million are registered as unemployed (ABS, 2018b). Pre-school children account for 1.5 million Australians, another 4 million are in compulsory schooling, and 1 million domestic students are in higher education, meaning that almost 25 per cent of Australians are engaged in formal education. Aboriginal and Torres Strait Islander (ATSI) peoples made up 2.8 per cent, or 650,000, of Australia's population, a steady increase over the previous two censuses of 2011 (2.5 per cent) and 2006 (2.3 per cent) (ABS, 2016). And almost 5 million, or one in every five, Australians are over the age of 60 (ID, 2016; Universities Australia, 2018).

These statistics reveal that education and learning policies that solely focus on the formal education sectors mean that significant numbers, and a growing proportion of the population, are not being included in the nation's education attention.

Participation in education is sharply differentiated by age group, falling with each decade's demographic group. In *Learning through life*, Schuller and Watson (2009) highlight four distinct, if overlapping phases of lifelong learning. Firstly, up to age 25, where people are undertaking more and more complex routes to labour market participation; between 25–50, where a combination of job, family and social obligations make time for learning hard to find for many; between 50–75, where adults begin disengagement from their main working lives, take on many of the responsibilities for maintaining civil society, and often have caring responsibilities for younger and older family members; and at age 75 plus, where later life brings its own distinct learning challenges. It is striking how little current provision differentiates between the different aspirations and interests of these cohorts.

Dramatic change is also occurring in the world of work. Work today is less stable and predictable, and workers, especially the young, are changing jobs more often. The impact of artificial intelligence (AI), automation and the gig economy, and questions about whether they will have positive or negative impacts on work, employment, welfare and wider society, add to concerns about whether existing education policies are adequate Impacts on welfare and incomes pose questions such as the whether the existing income support system is capable of meeting future change or whether there is a need for some new form of guaranteed minimum income. Due to changing demographics, there will likely be an increase in both paid and unpaid care work.

In 2017, the Senate established the 'Future of Work' inquiry specifically to examine and 'report on the impact of technological and other change on the future of work and workers in Australia'. This followed a commitment by the Labor opposition to hold a national inquiry into post-secondary education if elected in 2019. Its intention is to make sure 'Australians have access to the best post-secondary opportunities in the world', with the party arguing that '[i]t's time to rethink how we do things' (Plibersek, 2018). The announced scope of the Inquiry remains limited; however, as there is no reference to adult education

outside of TAFE or universities. Business groups have also taken up the argument that more needs to be done to address today's learning needs. The Business Council of Australia (2017) has advocated for the need to develop a 'culture of lifelong learning', and the Ai Group on the need to address digital issues for the workforce of the future (AiG, 2017).

Similar work and education issues were addressed by a recent UK report *Solving future skills challenges* (Universities UK, 2018). The background for that report was how to respond to the 'onset of the Fourth Industrial Revolution – automation, robotics, artificial intelligence and digital technology' together with the challenges of 'an ageing population and the rapid pace of change and increasing complexity of work'. It highlighted the need for continual upgrading of skills, lifelong learning and study of post-school qualifications at all levels, noting that by 2020 more than one-third of desired core skill sets of most occupations will be comprised of skills that are not considered crucial to the job today. This places educators in a difficult position where they have to prepare learners for jobs that don't yet exist, using technologies that have not yet been invented.

Like Australia, the UK has had a single-minded commitment to competency based training (CBT) and assessment over the past decades. However, reviews of vocational and technical education for post-16 education in the UK (DBIS/DfE 2016) point to findings that are worth close consideration in Australia as they question the policy foundations that have become orthodoxies, and question their ability in meeting 21st century learning needs. Two recommendations stand out, firstly, to move away from competency based assessment where a 'functional analysis of job roles' has dominated, often leading to an 'atomistic view of education' and a 'tick-box approach to assessment', and secondly, to stop publically funding private for-profit providers, and to instead prioritise organisations that re-invest any surpluses into education infrastructure (Moodie, 2016).

As identified above there are additional pressing challenges. Not all can be canvassed here, but all should be considered as part of a wider approach to learning.

## Re-conceptualising adult education and learning

Old frames of thinking shape the way we understand broad areas of

social practice, such as education, as well as how we think they continue into the future. Yet the challenges of the contemporary world require us to continually ask ourselves if those frames still help us understand the present and whether they assist us in conceiving the future.

A frame that is often used in educational metaphors is that of the journey, or the pathway. This metaphor often has two versions and both are linear progressions. Firstly there is the biological view, which sees learning as being a series of life stages – infancy, youth and adolescence, adulthood and onto senior life – where we make progress through these stages.

Another linear perspective sees learning as being a series of educational stages – early childhood education and pre-school, compulsory school years, vocational and/or higher education, on-the-job training and professional development, and then possibly third age learning. Here education is understood to be formal and primarily organised via institutions. Historically this has generated a hierarchy of educational importance, rendering some sectors, and elements within sectors, more important, and therefore deserving of funds and attention. This pyramid approach sees individuals progressing through pre-school to primary and secondary school where they then arrive at a fork in their path and, if they choose to continue institutional learning, are faced with the choice of university, TAFE or a private vocational provider. If they become a professional, they will likely undertake further study with a post-graduate qualification, supplemented by professional development and/or industry or professional association courses, and on-the-job training. Those who are non-professionals might also pursue some industry or on-the-job training. Outside of those options people may undertake some courses out of individual interest like language learning, sport coaching, crafts and so on. There are others who, once they finish school, might not undertake any further organised education or learning.

The problem is, however, that few people actually follow such orderly linear paths[2]. Australian and international research shows that the uni-linear educational 'journey' is less common than often suggested. In fact, individual learning is much more complex and 'messy' than this neat schema. The pressures of everyday life intervene, as work and careers change, individual need and motivations change and so on. Rather than

[2]Deloitte's survey of 4000 Australians provides detail about the way those workers see the changing needs of work in their futures (Deloitte 2018).

a set of 'upward' progressions, many students move back and forth between university, vocational education, on-the-job learning and adult community provision, as they seek to meet specific work and life needs that they understand can be better met through specialist providers at particular times (see Wheelahan, Leahy, Fredman, Moodie, Arkoudis & Bexley, 2012; Yu, Bretherton, & Schutz, 2012). Simultaneously other learning needs associated with personal health, language acquisition, technology, cultural awareness and so on are sought out and add to individual development while also benefiting the wider community. Yet others take time to recover from unsatisfying or negative school experiences and re-enter education through non-formal opportunities offered by community based providers.

Another way of conceiving of education and learning is as an ecological arrangement. This ecosystem metaphor, borrowed from biology, sees dynamically interacting systems of organisms (i.e. individuals and organisations) and the communities they make up. It is a perspective now applied beyond the natural sciences to fields such as urban ecology, community health and human ecology, and is pertinent to the broad educational environment incorporating early childhood, school-age, vocational and tertiary provision as well as formal, non-formal and informal delivery.

In the educational environment an inter-connected and inter-dependent array of providers and opportunities co-exist, where the health and sustainability of one element is strengthened by the mutual health of the others. Thought of this way, it is easier to appreciate the link between pre-school learning and higher education, between professional development, craft courses and community health programs, between community adult literacy and job programs, and so on[3]. It not only applies to institutions, but to individuals as well as they move in and out, and between different educational settings and are equally reliant on the availability of quality and relevant learning opportunities. It accords more closely with how adults go about organising their own learning, which is arranged through communities of interest, through local organisations and networks and is often place-based, self-help and special interest groups, or individually motivated learning.

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[3]In a similar but different analogy Driese (2018) identifies lifelong learning as the 'mortar' that holds the educational 'bricks' in place.

## Recognising the benefits of learning

There is powerful evidence that adult learning has positive health effects and prolongs active life. In 2012, Britain's Department for Business, Innovation & Skills conducted research on the impact of adult learning on other social policy issues, and found that the benefits of lifelong learning could be measured in five areas – mental health and wellbeing; physical health; family and parenting; civic participation; and attitudes and behaviours. The findings reveal both personal benefits such as improvements in life satisfaction and self-worth and reductions in self-reported depression, as well as economic benefits such as a reduction in the number of GP visits, the desire to find a better job, and improved financial expectations (BIS, 2012).

Other studies have also recognised participation in adult education as an effective preventative health measure for people at risk of mental illness, and a safe place to rebuild relationships when recovering (HMSO, 2008, Sfard 2008; Golding & Foley, 2011; ALA, 2016b). The broad and often unanticipated benefits of learning, ranging from reductions in medication use and overcoming isolation and loneliness, to improving racial tolerance and increased involvement in voluntary work have also been reported on (Feinstein, Hammond, Woods, Preston, & Bynner, 2013).

This is particularly relevant given the importance of mental health in Australia, as almost half of all Australians will experience a mental health disorder in their lifetime (DoH, 2018). Efforts to reduce the costs of mental health and find ways to reduce its prevalence led the Australian Government to launch a Million Minds Health Research Mission and instigate a Productivity Commission analysis in 2018 (Frydenberg & Hunt, 2018).

Adult education offers second chances to people who missed out in their earlier education, and first chances to people who never had the chance to go to school, a situation increasingly applicable with a rise in new arrivals in Australia from less developed regions. As immigration levels continue at a high rate, the need for English language provision is very important to enable full participation in work and society. And as more older people extend their working lives, public support for learning needs to be spread to those of all ages.

Adults who learn have a positive impact on their families, too. Sticht (2001) referred to this as 'double duty dollars' meaning that 'when we invest in the education of adults we may get multiple returns in terms of both improved productivity by adults at work, and improved literacy learning by the adults' children'. In other words, teach an adult, especially a mother, and children will also learn better.

## Policy coherence and cohesion: The cost of missing out

If learning through life is accepted as being important for individuals, the economy and society in order to allow people to fully participate, both now and in the future, then the cost of missing out is especially great.

A particular challenge for policy makers is bridging the current participation gap. For many people, returning to education as an adult can be daunting and difficult. Those who leave school without qualifications lack the entry-level skills or essential qualifications to find secure employment, and to progress into education later in life. There are even greater challenges for people for whom English is not their first language.

This education gap is closely tied to measures of equality and inequality. Participation surveys show that those adults with positive education experiences from their youth, fostered by home environments that encourage learning, and who regularly participate in learning after school intend to continue to do so. A significant portion with the opposite experience, and who have done no organised learning since school, similarly plan to continue as they are. The effects on their lifetime incomes, their ability to respond to a changing work environment and to read the world is not hard to anticipate, and has the potential to have an ongoing impact on their children (see for example ANTA, 2000; McGivney, 1989; Vester, von Oertzen, Geiling, Hermann & Müller, 1993; Watson, 2013).

There are obvious longer-term implications for learning later in life, especially for those disengaged at a young age. Educational environments need to be supportive, and provide the remedial content and methods to re-engage. Classifications of those who participate and those who do not, such as in ANTA's (2000) national survey and by Michael Vester (1993), show strong similarities. Vester refers to four groups of learners: permanent learners; traditional learners; instrumental learners; and non-learners. In both cases the first three

groups are either regular or occasional participants depending on life circumstances. Those in the fourth group, comprising around one-fifth to one-quarter of the population, are non-participants with little intention of ever taking up any organised learning in the future.

In today's civil society, where the fault lines of the impact of the financial crisis, globalisation and mass movements of peoples are more exposed, it is this group where those most damaged by the collapse of established social ties, traditional work patterns and who show a tendency to either withdraw into apathy from public life or to sympathise with aggressive radicalism, often of the neo-right variety, can often be found (See Field, 2006 pp. 62–64). Rising inequality has real consequences as Wilkinson and Pickett (2009) point out, more unequal societies 'suffer poorer health, higher mortality rates, increased levels of crime, higher levels of social isolation, and lower levels of trust for rich and poor alike'.

It is therefore particularly important, both from an individual and societal perspective, to provide and encourage participation in quality lifelong learning opportunities.

## Attributes of good public policy

The policy-making process itself is an important indicator of future success. While it requires leadership to initiate the process, progress relies on it being participatory and inclusive. Good policy builds in a developmental approach so that learning can happen on the way. It is capable of being implemented using current or existing capacities such as skills, institutions, infrastructure and finances, and works towards identified goals and deadlines with inbuilt mechanisms for review.

Through this process a coherent agenda can be set, structuring specific problems and adopting a course of action that has intra-policy coherence and which can be developed as a policy narrative to be used to explain and win support.

A national policy carrying the imprimatur of the national government has the advantage of authorising stakeholders to pursue and develop the complementary policies that make up an integrated framework. It harnesses existing disparate initiatives to come together to feed in and build a stronger framework, enabling something more to be created than is possible with fragmented policy and provision.

ALA's 1999 lifelong learning seminar posed the policy challenge of 'how to integrate the three overlapping sites of lifelong learning – learning in and for the workplace; learning in and through formal and informal education and training; and community-based learning. Integral to this challenge is developing financing mechanisms that will support such integration. What practical steps might be introduced that support the principles of lifelong learning – entitlements, cross-sectoral partnerships, informal learning opportunities and networks?' (Brown, 2000, p. 7).

The policy groundwork that commenced in the mid 1990s and continued into the 2000s provides a solid foundation for future development. The parameters and planks of what a national policy might look like already exist. For instance, seven attributes of a lifelong learning policy were set out by ANTA in 2000.

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

In addition, Kearns (1999) and his colleagues' report to NCVER on VET in the Learning Age similarly identified five key dimensions of lifelong learning in a learning society –

1. Foundations for all
2. Strengthen and develop pathways, bridges and transitions
3. Foster learning organisations and institutions
4. Extend the role of information and learning technologies
5. Develop learning communities

The practical implementation steps being followed by EU member countries to develop a comprehensive and integrated policy provides an updated guide on how similar work could evolve in Australia. The Education & Training (ET) Strategic Framework sets out seven benchmarks with targets across the education and learning spectrum. In addition, six working groups have been established including an adult learning group comprising experts from member states specialising in adult learning; social partners such as employers and trade unions; and civil society organisations working in adult education (EU, 2018b; EU, 2018c).

There are significant political differences among the member states yet they, along with the various social partners, are working together to progress the overall strategy. In a similar way, Britain's 'Education Revolution' initiatives of 1998–2003 had the support of the conservative opposition and the Liberal-Democrats and were largely uncontroversial politically.

## Conclusion

The arguments for why ongoing learning beyond formal school and immediate post-school is important are generally not in dispute. Almost everyone agrees that continued learning is good for individuals, the economy and society. And while there are detailed policy agendas and funding regimes for specific areas of education such as childcare, schools, universities and vocational education, the surrounding area of adult education activity exists largely in a policy vacuum. When the OECD Education Minsters in the 1970s and 1990s set themselves the task of rethinking the roles and responsibilities of all partners – including governments – in implementing and financing the organisation of 'lifelong learning for all', they developed an ambitious agenda that has been missing in Australian policy development for the past decade.

The history of adult education in Australia is primarily one of self-organisation and financing through community groups, voluntary and membership bodies. State support has been inconsistent and sporadic, at times rising and then falling away again. Provision has therefore needed to be self-sustaining, and, in the absence of government support, providers have found ways to be flexible, innovative and responsive to local need. In the main, governments have left the education of adults to local providers.

Adult education courses supported by government and delivered via community colleges, neighbourhood houses, WEAs and community centres have changed over the past 25 years as various government policies have changed. Many colleges and centres have fallen on hard times and a number have ceased to exist or merged with other providers. To a significant extent they have been replaced or supplemented by private provision, including self-help initiatives such as seniors groups like the U3A, book clubs, environment and walking groups, expert patient groups, single-interest bodies like the photography, architecture, and writing societies and men's sheds. In the workplace, innovative learning schemes utilising new technology and contemporary learning practices are being implemented. With the transformation that the internet provides, including online courses, new learning opportunities for the geographically remote, senior Australians, and those unable to access courses at the times on offer, are opened up. This mix of independent adult classes sits alongside the public and community provision that remains. Where adults have the confidence and the interest to come together to learn, they will create the means to do so. It is a resilient social activity.

Impressive as these voluntary efforts are, there is today a greater need for governments to provide the policy and financial support for broad lifelong learning. Public investment can help secure participation for under-represented groups, scale up effective innovations for example in adult literacy, digital technologies, and health campaigns, and support outreach work, building alliances with other community bodies, and workplaces of all sorts. Initiatives such as providing a 'learning credit' for people to use freely and not just for AQF courses has multiple benefits. They can be targeted towards lower income recipients and educationally disadvantaged adults. They can increase certainty and stability for community-based providers, and contribute to job creation among teachers to provide broad educational opportunities where people live and work and support communities' development.

Without attention and support, participation wanes, especially among those most in need, and this has proved to be the case in the aftermath of the global financial crisis. Between 2009–2014, participation in UK education and training by 16–64 year olds fell from 20.1 per cent to 15.8 per cent (Eurostat, 2015). Similar falls are evident in the European member states, from 9.8 per cent of the 25–64 year-old population in

2005 to 9.1 per cent in 2010, thus making the 'ET2020' target of 15 per cent by 2020 more challenging.

In Australia, withdrawal of state funding means there is now a reduced ability to monitor participation in the adult-learning sector. Collecting only raw data in the national statistics means that the fine-grained detail required for evidence-based policy is missing. It limits the ability to know who is learning, what and why they are learning and where they participate, which in turn undermines high-quality research.

The policy stagnation that Watson (2004) identified does not need to stay that way. Indeed the issues facing Australians today, whether about work, the environment, inequality, health, living together in communities or engaging in civic life, make the need for an integrated broad lifelong educational policy framework more pressing. The external forces that drove the initial agenda for lifelong learning in the 1990s are still there but more intensely so, and the evidence supported benefits of adult learning remain equally compelling.

Adult Learning Australia convened a National Lifelong Learning Seminar in 2018 to once again pose the need for a broad, inclusive national learning policy framework. Its aim was to 'put lifelong learning in the centre stage' of Australian discussion to counter inequality, disadvantage, poverty, intergenerational unemployment, and widening disparities between rural and regional Australia (ALA, 2018).

The challenge today is to take up the work of the past twenty-five years within a national policy framework. To once again imagine a broader concept of learning, one that complements a skills strategy with one that embraces broad lifelong learning opportunities.

Meeting that challenge, is the challenge.

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# University engagement in achieving sustainable development goals: A synthesis of case studies from the SUEUAA study[1]

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*While initial discussions of the third mission of universities focussed on market-orientated behaviours of universities, more recently it has been connected to activities that focus on social justice and promoting sustainability (Trencher, Bai, Evans, McCormick & Yarime, 2014; Appe & Barragán, 2017). It has been suggested that the third mission of universities in the Global South may be particularly significant in addressing acutely felt issues of climate change, economic inequalities, food insecurity and urban sprawl. The current paper explores this and asks whether the quadruple helix (Carayannis & Campbell, 2010) is visible in their engagement activities.*

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*Using a synthesis of case studies developed as part of the 'Strengthening Urban Engagement of Universities in Africa and Asia' (SUEUAA) project, a collaborative research project spanning seven cities (Glasgow; Harare; Dar-es-Salaam; Johannesburg; Duhok; Sanandaj; and Manila), we explore ongoing engagement activities where universities respond to city demand. We frame this in terms of Sustainable Development Goals.*

*Results indicate while universities were seen to address city demands, they often reacted without a network of other influential actors (i.e. industry, local government or NGO partners). This suggests that currently, the quadruple helix is underdeveloped in these cities, and more work should be done in creating closer links.*

***Keywords:*** *third mission, Global South, quadruple helix, community engagement*

## Introduction

Globally, our cities are facing a range of interconnected challenges, with issues spanning the natural environment, economy and social realms. Banerjee (2003, p. 144) suggests that human progress and economic development 'has come at a price; global warming, ozone depletion, loss of biodiversity, soil erosion, air and water pollution are all global problems with wide-ranging impacts on human populations'. However, there is an increasing divergence between the challenges facing the Global North and South, with areas of the South often experiencing the most extreme instances with higher levels of unemployment, ill-health and poverty, and issues such as migration placing increasing demands on infrastructure. In addition, those countries experiencing highest rates of inequality are further made vulnerable to the consequences of climate change with flooding, drought and large scale extreme weather events, such as Super Typhoon Mangkhut in 2018. These negatively impacting access to power, damaging housing and infrastructure, and triggering landslides and flooding. It can also have a devastating effect on food production. These issues significantly impact the livelihoods, health and wellbeing of the population.

As the challenges facing the Global South are diverse and complex, with the drivers of poverty multifaceted, resolving these issues requires a complex and interconnecting system of activities. One way to understand and address these issues is through a sustainability approach. There are several different interpretations of this approach, some highlighting the importance of sustainable development for social development (Stenn, 2017) or as a consensus between economic, environmental and social matters (Sachs, 2012). The most commonly used definition of sustainable development comes from the World Commission on Environment and Development (WCED) report in 1987, 'Our Common Future'. In this, sustainable development is defined as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (World Commission on Environment and Development, 1987). Brundtland, the then chairperson of WCED, acknowledged the present issues of sustainability of non-renewable resources (fossil fuels and minerals), extinction of ecosystems and loss of plant and animal species.

There are significant criticisms of sustainable development. Some critique it for its roots in colonialism, particularly with the Global North setting the definitions for poverty and potentially disempowering rural populations in the Global South (Banerjee, 2003), and its lack of clarity as to what is at the root of sustainability measures (Byrch, 2007; Escobar, 1995). In terms of the latter, many scholars have argued that the core aim of sustainability is to secure economic growth without environmental destruction, leading to a question as to whether economic growth is the subject of sustainability rather than the environment (Escobar, 1995; Redclift, 1987). Acknowledging the complexity of the term, John Blewitt suggests we look at sustainable development as 'a collage or a kaleidoscope of shapes, colours and patterns that change constantly as we ourselves change' (Blewitt, 2008), and therefore to make sense of the shapes in the best way we can, in the lens we chose. To develop a solution for the varied and ingrained issues facing our ecosystems, economy, environment and populations requires multiple voices working together to make sense of these shifting patterns. Importantly, ensuring that we listen and empower voices from differing groups, from academics, industry, government, but also in the communities most affected by these issues.

The importance of sustainability in developing solutions of global challenges has been adopted by the United Nations (UN), first through the

Millennium Development Goals (MDG) (2002–2015), and now with the Sustainable Development Goals (SDG) (2015–2030). The UN has called on its partners to develop a concrete action plan for the world to reverse poverty, disease and hunger affecting billions of people in the world. The goals follow a 'triple bottom line approach to wellbeing … a broad consensus on which the world can build' (Sachs, 2012), with a focus on economic development, environmental sustainability and social inclusion.

This paper aims presents initial findings from the SUEUAA study, exploring how Universities in six Global South cities engage with the Third Mission. We provide case study evidence of ongoing engagement activities of the Universities, using the SDGs as our framework to promote discussion regarding the sustainability agenda of Universities.

## Sustainable Development Goals

> *'The challenges cities face can be overcome in ways that allow them to continue to thrive and grow while improving resource use and reducing pollution and poverty. The future we want includes cities of opportunities for all, with access to basic services, energy, housing, transportation and more.'*
>
> (United Nations, Sustainable Development Goal 11)

The MDGs were a 'historic and effective method of global mobilisation to achieve a set of important social priorities worldwide' (Sachs, 2012, p. 2206), focussed on poverty affecting the Global South. Sachs suggested that through the ability to 'package' these priorities into eight goals with measurable and time bound objectives, it enabled the easy promotion and, importantly, political accountability to ensure these goals were met. While some countries met the MDG goals, others made little progress. However, there was a consensus that after the time period of the MDG ended, the global fight against poverty should continue. The focus on 'sustainable goals' was important, as it ensures that solutions meet the needs of the present without compromising the ability of future generations to meet their own needs (WCED, 1987), with an emphasis on an inclusive and resilient future for both the population and the planet. Unlike the previous MDGs, the SDGs were designed to be universal in scope, and able to be applied to all countries rather than only those in the Global South. Based around a series of 17 goals (see Text Box 1), each with a wide range of

targets, SDGs cover a broad range of socio-economic development issues, including issues of poverty, hunger, health, education, climate change, gender equality, water sanitation, energy, social justice, environment and urbanisation. It has been described as one of the most significant global efforts made to advance wellbeing while recognising the planet's ecological limits (Ramos, Caeiro, Moreno Pires, & Videira, 2018). There appears to also be stronger interconnections among the goal areas in terms of biophysical and socio-economic points of view than existed in the MDGs, with many of the SDG themes (such as 'health') found in their namesake goal (SDG3) but also across a range of other goals (with SDGs 2, 6, 11, 12 all referring to health in their wording) (Le Blanc, 2015). In doing this, we begin to see how the 'bottom lines' of development are informing a wider range of goals and highlight the importance of not viewing the goals in isolation, but in understanding the holistic goals of the wider SDGs.

***Figure 1:*** *The Sustainable Development Goals*

## Role of the university in addressing SDGs

Key to the SDG agenda is partnership working, ensuring that public and private organisations work together for the common good. One partner that is often rarely discussed in SDGs is that of the university. Given the role of universities in social and technological innovation and their so-called *third mission*, where they are increasingly called on to contribute to wider society beyond the research and teaching duties, it is clear that they have an ability to tie their agenda to real world sustainability issues (Crow, 2010).

Similar to the term 'sustainable development', there is no agreed definition of the 'third mission' or exactly what activities are included in this 'third' area, although it is agreed that these activities are those beyond the research and teaching remit of the university. Often third mission asks how universities can make contributions to wider society (Zomer & Benneworth, 2011) across all potential domains of their activity, and whilst in some cases the term is used synonomously with 'extension' and 'outreach', it has a wider connatation that goes beyond offering continuing education programmes and knowledge transfer. These activities, variously known as 'extension' and 'outreach', are longstanding in universities (Martin, 2012), the term 'third mission' to describe these activities and much more is relatively new. Third mission includes a sense of reciprocal community engagement and service to a range of stakeholders in the locality of HEIs (Inman & Schuetze, 2010). Etzkowitz, Webster, Gebhardt and Terra (2000) describe it as the move away from the 'ivory tower' towards having a leading role in creating innovative initiatives in a knowledge based society. Key to these innovative initiatives is the complex set of interactions with institutional actors, such as government, industry and the third sector (Datta & Saad, 2011). It positions the university in place and demands that it works with local actors in order to generate innovations or solutions. The third mission can refer to a variety of engagement activities and has evolved considerably in the last 25 years. It sometimes corresponds to the idea of the 'entrepreneurial university' (Saunders, 2010), which relates in large part to university behaviours that are driven by economic consideration, and involves activities such as commercialisation, patents and licensing. Whilst there has been a drive for social change in some aspects of third mission, critics suggest that this is still driven by economic drivers (Trencher, Yarime, McCormick, Doll, & Kraines, 2014).

These engagement activities occur within a range of systems, with the changing macro level system of policy and polity requiring acknowledgement. Specifically, action occurs often within administrative hierarchical systems which leave little room for fully flexible thinking. Therefore the influence of national government, culture, public opinion and influential media all play a role in how university engagement is perceived and facilitated. However, at times, it is unclear as to how much the growing importance of the third mission is a reflection of policy aspirations, changing economic environments, growing links between universities and industries, or changes in the culture of academia (Uyarra, 2008). What is clear is that for the third mission activities that focus on economic drivers, the physical and hard sciences are better able to engage with industry, create patents and generate income (Trencher et al., 2014a).

Another area of third mission activities focus on a social justice agenda, which can be linked to the sustainable development agenda. While some authors suggest this is outwith the remit of the third mission (Trencher et al, 2014a), others suggest it is an evolution of the term. Whether these activities fall within the remit of the third mission or otherwise, the renewed social justice agenda positions universities as potentially a 'social transformer and co-creator' (Trencher et al, 2014a) or 'the anointed agents of social and economic transformation in the 21st century' (Douglass, King, & Feller, 2009). Trencher argues that there is huge potential for universities as leaders in the development of sustainable solutions, as he believes the generation of effective remedies for the embedded and wicked challenges of sustainability across the social, economic, cultural, political and environmental spheres pose too great a challenge for central and local government alone. Instead, the university, with its academic expertise and funding for innovations, could enable a more creative lens to look at problems. For the purpose of this paper, we will focus these activities.

## Triple and quadruple helix

Core in the third mission engagement activities are the interactions between universities, government and industry. This has been referred to as the 'triple helix of innovation' (Etzowitz, 2003). The triple helix suggests innovative solutions can be created through the close working of three spheres: industry, government and academia. Within this

relationship, each actor contributes expertise as per their function in society, in that governments establish regulatory frameworks to control the public sphere, industry creates wealth and academia generate intellectual capital to introduce and manage technological change (Borkowska & Osborne, 2018; Datta & Saad, 2011). Within this triad, knowledge creation is flexible and non-linear, relying on the input of all three. This model has been adapted to include a *fourth* helix: civil society, which underpins the importance of the social dimension in innovation generation (Caryannis & Campbell, 2010). Rather than the top-down approach of the triple helix approach, the quadruple helix also includes some bottom-up approaches, where innovation is informed by societal demands. It is within this inclusion of civil society that we understand how the third mission begins to focus on sustainable solutions to population challenges (Borkowska & Osborne 2018).

This is particularly pertinent when looking at the responsibilities of universities in the Global South who are positioned in the cities with the highest need, and are most affected by issues of climate change, economic crisis and social transformation. While universities in the Global South are not necessarily any more engaged than those in the North, Grau, Goddard, Hall, Hazelkorn and Tandon (2017) suggest that the SDGs are a good starting point for establishing concrete global objectives. In particular, ensuring universities build capacities for SDG policies, planning and management. Higher education institutions are increasingly involved in sustainability work, both in terms of engaging in global debates, but also participating in direct action (Pederson, 2017). In a Global Universities Network for Innovation (GUNI) report (Hall & Tandon, 2014), we see examples of universities in the South engaged in projects related to poverty reduction, food security and health, and we seek mutual knowledge exchange. However, often these universities face significant problems in living up to the triple helix paradigm, mainly that while they may wish to participate in the socio-economic development, they are poorly integrated into the wider socio-economic system that it is often difficult to impress impact (Mtawa, Fongwa, & Wangenge-Ouma, 2016; Preece, Ntseane, Modise, & Osborne, 2012; Saad & Zawdie, 2008).

## Study context

Given the focus and importance placed on Higher Education Institutions (HEIs) to promote and actively engage in third mission activities, and

how this permeates HEI discourse and policy (Zomer & Benneworth, 2011) both nationally and internationally, our study asks how HEIs in the Global South are engaged in third mission activities.

SUEUAA (Strengthening Urban Engagement in Universities in Africa and Asia) is a collaborative project, funded by the British Academy's GCRF Cities and Infrastructure programme. Alongside the University of Glasgow, academics from six universities (referred to hereafter as 'study partners') in six cities in the Global South (University of Duhok, University of Kurdistan, Philippine Normal University, University of Zimbabwe, University of Dar-es-Salaam and University of Johannesburg) explore the third mission of the university in their city context. The wider hypothesis of the study describes the belief that the SDGs as they relate to education, healthy workforce development and wider city development, can be addressed more effectively through the better understanding of the contribution of HEIs to their place of location. It is argued that a regionally sensitive investigation, particularly through use of case studies, may enable a more nuanced picture to develop of how the third mission is enacted in urban settings in the Global South.

The study sought to investigate the ways in which HEIs contribute to developing sustainable cities in the context of major social, cultural, environmental and economic challenges. In doing so, it aimed to strengthen links between cities and HEIs. Building on work by Charles, Benneworth, Conway, and Humphrey (2010), the study aimed to benchmark the work of the universities in terms of their community engagement and third mission work. The study took a broad definition of urban engagement, including activities that supported the development of physical infrastructure, ecological sustainability and social inclusion. In particular, it was interested in how universities, in dialogue with city stakeholders and NGOs, can impact on policy in order to promote sustainable change. The study was organised in two work streams: development of case studies regarding current work being undertaken by the university relating to the third mission; qualitative interviews and focus groups with university and city stakeholders to better understand the facilitators and barriers to developing strategic relationships with the aim of developing sustainable solutions to city problems. For the purpose of this current paper, we focus on the first work stream.

## Methods

Initially a case study approach was taken, as it enabled a holistic and in-depth exploration of how universities in the six partner cities engaged with their city. Definitions of case studies differ, with Yin (1994) for example describing the importance of scope, process, methodological characteristics and the empirical nature of the case, whilst Flyvbjerg (2011, p. 103) states case studies should be seen as an 'intensive analysis of an individual unit (person or community) stressing the developmental factors in relation to environment'. The literature surrounding case studies is also concerned with the inherent ambiguity as to whether case studies are a *methodology* or a *method* (Harrison, Birks, Franklin, & Mills, 2017). Philosophical underpinnings also differ, although we believe our findings are best perceived using Yin's (1994) post-positivist belief that case study is a form of empirical inquiry in a 'real world setting'. In this way, we acknowledge rival explanations, and the interpretive elements in the case study design.

The research team in each city explored current practices relating to the third mission of their HEI system or sub-system[2]. In order to place the third mission activity in context (Yin, 1994), the partner city researchers provided a broad overview of their cities issues as relating to sustainability, and also how the third mission activities could be seen to improve the economic, environmental or social issues affecting their city. The case studies also took account of the lessons of Preece et al (2012) in their discussion of difficulties in implementation of university activities in cities of the Global South, and interrogated how the intervention could be seen to make a difference.

Case studies were presented in two ways: single case study of a single third mission activity by a single university, and 'thematic' case studies, which used a multi-site approach involving multiple third mission activities from multiple universities which all centred on a 'theme'. The research team agreed to these themes prior to the data gathering period. The team agreed the themes reflected the main trends in Global Challenge work: gender, environment, migration and policy. The research team in each city gathered data relevant to each of the prescribed themes. The data took the form of available statistics online,

[2]This varied according to the size of city and system.

policy documents, with additional information provided through communication with university departments regarding relevant engagement activities. While the individual case studies were single authored, the larger thematic case studies were co-authored, with a member from the University of Glasgow team working in collaboration with at least two partner city academics. All case studies and thematic papers have been published on our study website (http://sueuaa.org). The links to all the thematic papers, case studies and further reading can be found at the end of the document.

The current paper represents a synthesis of the SUEUAA single and thematic case studies. These case studies were mapped onto the SDGs described above. The results below highlight the ways in which the third mission activities described in the case studies can be seen to promote sustainable solutions to the SDGs.

## Results

Prior to discussing the ways in which the SUEUAA case studies can be applied to the SDGs, it is important to first outline how the third mission was understood in our six case study cities. This was the topic of an earlier thematic paper emanating from the project (Hirsu, Reyes, Hashemi, Ketuly, & Mohammad, 2018a).

Hirsu et al commented that university policy across the six case study cities referred to the importance of supporting developmental efforts in their locale. Linked to this was the acknowledgement of their responsibility to respond to the social and environmental challenges, as well as contributing to the global reputation of the university. The paper highlights the importance of the phrase ‘world class’ in these documents, positioning the university beyond merely the city location. Table 1 illustrates the general trends in terms of third mission policy discussions. In terms of what type of community engagement was referred to in policy, the areas were varied. These included: responses to environmental change; unstable social or political environments; disparities between rural–urban communities; health-related challenges; knowledge production and building collaborations between universities and various stakeholders.

***Table 1:*** *Third mission in university policy documents (adapted from Hirsu et al, 2018a)*

| | **Knowledge transfer** | **Training and outreach/ extension services** | **Working with government and policy makers** | **Working with local community** | **Sustainability** | **Dedicated space for third mission activities** |
|---|---|---|---|---|---|---|
| Duhok, Iraq | Y | Y | Y | Y | ? | / |
| Sanandaj, Iran | Y | Y | Y | Y | ? | Entrepreneurship Units and Growth Centres, Support Incubators, Science and Technology Parks |
| Manila, Philippines | Y | Y | ? | ? | ? | Extension Programmes<br><br>Centres for Excellence and Centres for Development |
| Harare, Zimbabwe | Y | Y | Y | Y | ? | Industry Creating Hubs |
| Dar-es-Salaam, Tanzania | Y | Y | Y | Y | Y | Institute of Production Innovation<br>Research and Development Institutes |
| Johannesburg, South Africa | Y | Y | ? | Y | ? | Township Marketplace Platform |

Hirsu et al (2018a) highlighted a number of barriers experienced when collating evidence regarding the third mission of the universities. One of the main barriers was that university policies do not always reflect the wide range of ongoing public engagement and impact activities occurring in the university. This may be due to the differences between

departments, with individual academic units or staff members taking more responsibility than others to engage with local communities. These activities are therefore not documented in official policy, and are rather the career-orientated activities of small teams. Also missing from the policy documents was the importance of interdisciplinary working, and holistic partnerships between municipalities and universities. The latter also relates to the relative paucity of policy relating to the quadruple helix (community-directed engagement).

Another issue was that while there were general comments regarding third mission, and the need to connect with civic society; less was discussed regarding specific action plans or guidelines to support these important public–private partnerships. Hirsu et al refer to the work of Bailey, Cloete and Pilla (2011, p. 107) and their comment of the policy of the University of Dar-es-Salaam that 'there is no real linkage between economic development and higher education planning at the ministerial level, and higher education issues are limited to only one ministry'. This suggests a gap between the ambitions of policy makers, and the reality of work at the university. The paper goes on to comment that several of the policy documents refer specifically to vulnerable populations, or the importance of joined up working. Some city policies, such as those of Sanandaj, only briefly mention the importance of university partners, but lack detail regarding their active role in university strategic plans.

Therefore the next section of results is presented while being mindful of the policy environment through which the third mission was enacted. Using the SDGs as a framework, we explore case studies of engagement provided by our SUEUAA partners. These case studies are not an exhaustive list of all engagement of the various universities, but rather aims to provide an overview of some of the active projects being conducted in the year of the study (2017/18).

Case studies collected for the SUEUAA project showed a strong contribution to five SDGs in particular: end hunger (SDG 2), inclusive education (SDG 4), gender equality (SDG 5), sustained economic growth (SDG 8), and make cities inclusive, resilient and sustainable (SD 11). These are summarised in Table 2, and discussed in more detail below.

***Table 2:*** *Overview of case studies*

| SDG | SUEUAA paper | Cities involved | Activities | Target audience | Stakeholders involved |
|---|---|---|---|---|---|
| 2 | Case study four | Dar-es-Salaam (Tanzania) | Development of new technology, training workshops, conference | Agricultural sector, local farmers | Consortium of Universities, policy makers |
| 4 | Case study six | Manila (Philippines) | Outreach work in local community around health and wellbeing | Local women, orphaned children | Directly working with local communities |
| | Case study two | Duhok (Iraq) | Inclusive education programme | Individuals with additional support needs in local community | Made possible by change in education policy |
| 5 | Thematic paper four | Manila (Philippines) Sanandaj (Iran) Duhok (Iraq) | Scoping paper exploring gender mainstreaming in three cities (*specific example from thematic paper)* | / | / |
| | | Duhok (Iraq) | One-to-one support in refugee camps (*specific example from thematic paper)* | Migrant women (particularly those affected by trafficking) | University collaboration in Duhok and Germany |
| | | Sanandaj (Iran) | Workshops supporting gender empowerment (*specific example from thematic paper)* | Orphaned children, children with disabilities | |
| | Case study six | Manila (Philippines) | Gender sensitivity training programmes and seminars | University staff, teachers, community leaders, citizens | University developed training to be delivered to others. No other stakeholders involved in developing materials. |
| 8 | Case study one | Harare (Zimbabwe) | Training workshops on basic business skills and basic mathematics | Street sellers in the local informal economy | Pilot programme with agreement from local ministers |

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|---|---|---|---|---|---|
| 11 | Thematic paper two | Johannesburg (South Africa)<br>Duhok (Iraq)<br>Sanandaj (Iran)<br>Mania (Philippines) | Scoping paper exploring how Universities respond to environmental challenges across different climatic situations | / | / |
| | | Sanandaj (Iran) | Research focused on developing earthquake resistant construction strategies (*specific example from thematic paper)* | Urban areas, rural areas, unemployed populations (who may receive employment in building) | / |
| | | Johannesburg (South Africa) | Developing renewable off-grid solutions for agriculture; development of biofuel (*specific example from thematic paper)* | Rural populations, urban populations | Neighbouring technology stations, Sustainable Energy Technoloy and Research Centre, University of Johannesburg |
| | | Dar-es-Salaam (Tanzania) | Research into possible sustainable replacements for wood fuel | Rural community, wider country implications (90% of energy comes from wood fuel) | Responding to Government desire to reduce use of charcoal when cooking |
| | Case study seven | Sanandaj (Iran) | Consultation regarding environmental damage caused by dam construction | Rural community; water access to wider Kurdish region | Consultancy with private dam construction companies |

## SDG 2: end hunger, achieve food security, improve nutrition and promote sustainable agriculture

As the global population continues to expand, a strain is put on agricultural production as the demand for food increases. SDG 2 comments that 'ending hunger demands sustainable food production systems and resilient agricultural practices … increased investments are needed to enhance capacity for agricultural productivity' (UN, 2017a). The 2030 Agenda recognises that this focus on both development and investment in agriculture (in terms of livestock, fisheries, crops, aquaculture) has a major role to play in ending poverty, bringing about sustainable development, and combating climate change (Food and Agriculture Organisation of the United Nations, 2016). There have been calls for greater attention to be paid to innovative solutions to these issues, to ensure agricultural production is increased in a sustainable manner, to manage food waste and loss, and ensure those experiencing malnutrition have access to nutritious food. This includes increasing smallholder productivity, and income of these smallholders, and recognising the links between poverty, gender, public health, climate change and the local economy. Boosting yields on existing agricultural lands is a challenge, particularly in areas experiencing drought, land degradation or over-farming. Sustainable agriculture practices require wise management of scarce water (i.e. through improved irrigation or storage techniques), through new innovations in farming, or through development of new crops.

One way to develop sustainable solutions is through an increase in integrated decision-making processes, and the promotion of the quadruple helix, encouraging collaborative working between national and regional decision makers, and experts in industry and university sectors. A concrete example is found in our Tanzanian case study (Mwaikokeysa & Moshi, 2018). Our partners at University of Dar-es-Salaam described the work of the College of Agricultural Sciences and Fisheries Technology at the University of Dar-es-Salaam in addressing the issues faced by the agricultural informal sector in the city. During a pilot project, involving a consortium of local universities, the department sought to address the inadequate value addition in agricultural and fisheries products, and inadequate adherence to standards. The project designed an integrated poultry, tilapia and vegetable farming system with the aim to enhance fish, poultry and

vegetable harvests. In order to engage with local communities, the consortium of universities has offered training workshops for relevant stakeholders, produced policy briefings and held a high-profile conference. There are echoes here of the land-grant universities in the United States which were established as agricultural extension (McDowell, 2003), and of course this linkage between agriculture and universities has been part of the role of African universities for decades (Mtawa, Fongwa, & Wangenge-Ouma, 2016).

### SDG 4: Ensure inclusive and equitable quality education and promote lifelong learning opportunities for all

Education for all is one of the core elements of the sustainable development agenda. Irina Borkova, Director-General of UNESCO commented that 'economic and technological solutions, political regulations or financial incentives are not enough. We need a fundamental change in the way we think and act' (UNESCO, 2014, p. 16). Education for all also means eliminating gender disparity, and ensuring that rural and urban, and affluent and deprived children are all able to access quality education; and to have these aims extend to adult lifelong learning. Many development agencies recognise the key role education plays in promoting sustainable development, and the necessity to ensure the integration of sustainable development into both the formal curriculum and informal educational opportunities (UN, 2017b). By highlighting the need to encompass both formal and informal education, it ensures individuals are able to acquire understanding, skills and values that will enable their participation as active citizens in society (Association of Southeast Asian Nations (ASEAN), 2014), whether this be through early years education, vocational training or workshops. One issue is how to ensure groups with multiple disadvantage are also able to access these opportunities. Globally, it is acknowledged that these groups, those who experience a number of challenges linked to issues such as ill health, disability, poverty, rurality, illiteracy and (forced) migration are less likely to have access to services (UN, 2017b).

In our Philippines case study (Reyes, 2018), our partners at Philippine Normal University described the work by the University Centre for Gender and Development (UCGD) in providing outreach work for disadvantaged and disempowered groups in the local community

in Manila city. This outreach work did not involve city or industry partners but instead worked with the local community, and ran workshops with local women on issues of health and wellbeing, child rearing and nutrition. They have also conducted work with local orphanages looking at issues of body autonomy, personal safety and hygiene. Another example of SDG 4 was found in our Iraq case study (Ketuly & Mohammad, 2018), our partners at the University of Duhok describe working with German universities to develop solutions and interventions focussed on creating a more inclusive educational environment for individuals with disabilities or additional support needs. The result of the collaboration was the joint programme 'disability studies and rehabilitation', which has been ongoing for two years. The programme aims to create more opportunities for adults with disabilities who may have previously experienced barriers in participating in formal education in Duhok, and the wider nation of Iraq.

### SDG 5: Achieve gender equality and empower all women and girls

Issues of gender inequality persist worldwide, affecting access to basic rights and opportunities for girls and women. These include issues affecting access to decent work, wage equality, access to education, healthcare and representation both in professional/managerial positions but also in political and economic decision-making processes. The necessity to include and promote women's participation in all areas of sustainable development was highlighted in the UNESCO report 'The Future We Want' (UNESCO, 2014).

Aspects of gender were explored in the gender thematic case study (Hirsu, Reyes, Hashemi, Ketuly, & Mohammad, 2018b), and involved contributions from our partners from Philippines Normal University (Manila, Philippines), University of Duhok (Duhok, Iraq), and University of Kurdistan (Sanandaj, Iran). It explored the issue of *gender mainstreaming* in city-level interventions and leadership using publicly available data, and policy documents from each of their cities. Gender mainstreaming refers to activities that promote 'women's full and effective participation and equal opportunities for leadership at all levels of decision making in political, economic and public life' (SDG 5.5). Although critics have suggested it mainly acts to integrate women into existing neoliberal and patriarchal structures

(Alston, 2014), rather than seeking to create substantial engagement opportunities to ensure women have ability to create sustainable impact in communities. Discussions in the thematic case study highlighted issues of employability after formal education, with a focus on post-university transitions across the different cities. Despite relatively equal levels of participation of males and females at undergraduate stage, at postgraduate level and above, increasing levels of inequality are seen. Also, in all three cities, women are yet to enter the top-level management of the University. As stated in the paper, the lack of visibility of women in top-level management positions is significant as 'it limits the prospects of change in relation to gender issues and policies'. This trend was also seen in broader employability of university staff, with higher levels of male staff compared to female staff in some areas.

The paper goes on to discuss city-level interventions directed by university staff, to address issues affecting women in the city. Including the University of Duhok's College of Medicine supporting migrant populations at refugee camps, and in particular women who have experienced physical abuse, sexual violence or slavery; and the University of Kurdistan being involved in a charity focussed on supporting orphans, children with disabilities and promoting gender empowerment. The work of the Philippine Normal University has been discussed above (SDG 4).

### SDG 8: Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all

SDG 8 highlights that increasing labour productivity; reducing the unemployment rate (especially for young people) and improving access to financial services are essential components of sustained and inclusive economic growth (UN, 2017c). In the 2030 Agenda for Sustainable Development, there was an emphasis on decent work, employment creation, social protection, and workers' rights as integral elements. Particularly as social rights and income are seen as tools to eradicate poverty, there is a responsibility on governments to establish productive occupational opportunities for their populations. This is particularly the case for vulnerable groups such as women, the urban poor, low income urban residents and unemployed rural labour.

However, the 2016 ILO report comments:

> *[E]conomic growth on its own has failed to reduce poverty. A case in point is Africa which experienced the fastest growth rates among all regions over the past decade, yet decent work deficits persist and improvements in poverty rates hate been slower to materialise than in other regions.*
>
> (International Labour Organization, 2016, p. 97)

This report instead described the need to have carefully designed employment and income policies to support individuals and boost participation in the labour market and facilitate transition into formal employment. In doing so, there is a need to create sustainable enterprises, for small and medium size ventures. This would be realised through supportive mechanisms in local and central government and could be managed through effective tax regimes, business registration and regulation.

A Zimbabwe case study from our partners in University of Harare (Nherera, 2018) highlights the ways in which their university has responded to high levels of local unemployment, and corresponding levels of individuals in the informal sector. Zimbabwe is currently facing rising unemployment, because of policy inconsistency, sanctions, corruption, inadequate infrastructure and a dependence on external currencies (International Labour Organisation, 2016). While formal employment rates are low, there is a rising informal economy, in industries such as mining, agriculture and street vending. The informal economy is characterised by poor working conditions, no job security and no investment in civic society. While an estimated 90% of the working age population engage in the informal economy, they contribute approximately 5% to national GDP. Currently, an intervention is being developed to enhance the capacity of the informal sector workers to transition to formalised work. The University is seeking funding to develop a training scheme targeted at groups of informal street vendors in the city. They will be taught a variety of skills which would enable them to develop a formal street trading business (social skills, basic mathematics, as well as professional skills such as bookkeeping, marketing and management). They believe this will enable workers to receive adequate training to becoming formalised business owners, and therefore be able to contribute fully to the local economy.

## SDG 11: Make cities and human settlements inclusive, safe, resilient, and sustainable

Over the last 50 years, the world has experienced unprecedented urban growth, with 55% of the world's population living in urban areas, rising to an estimated 68% by 2050 (UN, 2017d). One in every three people will live in cities with over 500,000 inhabitants. Understanding key trends in urbanisation is crucial to the development and implementation of sustainable solutions to the increase in urban population. As urban populations require an abundance of sustenance and energy to function, increased urban populations are associated with a range of challenges: strain on infrastructure, energy systems, transportation, and for services such as healthcare and employment. Rapid urbanisation is also linked to large slum settlements, increased air pollution and unplanned urban sprawl, which all make cities more vulnerable to disasters.

The environmental thematic case study explored these issues across different city contexts (Burnside, van Rensberg, Moshi, Ketuly, Mohammad, Azizi, and Argamosa, 2018). It involved contributions from our partners from University of Johannesburg (Johannesburg, South Africa), University of Dar-es-Salaam (Dar-es-Salaam, Tanzania), University of Duhok (Duhok, Iraq), University of Kurdistan (Sanandaj, Iran), and Philippine Normal University (Manila, Philippines). Using policy documents and other available data from each city, they highlighted existing work being carried out to respond to environmental challenges facing cities in very different climatic situations. The thematic case study focussed on academic interventions in response to long-term chronic environmental stresses (increasing temperature, air quality degradation, major disasters). One such disaster is earthquakes, an issue in Sanandaj where seismic activity is common. The University of Kurdistan is engaged in research concerning building materials and earthquake resistant construction strategies. It also explores the growing green economy, using an example of a case study from University of Johannesburg in waste to energy conversion, and exploring renewable off-grid solutions to support production, food processing, waste and waste management of rural and urban small-scale farmers. Through the use of biofuels (liquid or gaseous fuels derived from organic material or biomass), they explored the significance for using this as a fuel source for the transport sector. A similar case was developed by the University of Dar-es-Salaam, who explored possible replacements for wood fuel

(which currently accounts for 90% of energy in Tanzania). As this has implications for deforestation, soil quality and water retention, it is important for a sustainable solution to be found. One potential solution is a plant-source feedstock that would be drought resistant, so it can be grown in Tanzania and support the local economy's fuel requirements.

In the individual case study of Sanandaj, Iran (Azizi, 2018), the issues surrounding environment were also discussed. In particular, collaboration between private companies building dams in Kurdish region of Iran and University of Kurdistan's Department of Urban and Natural Resources. Initially dam construction led to compulsory purchase of land, and the subsequent displacement of populations in the regions. The water from the region was diverted, and there were issues of water and air pollution, and destruction of eco-systems in the area. The University was involved in discussions aimed at lowering the environmental impact of the construction and have created more effective methods for maximising outputs of natural resources.

## Discussion

The work highlighted here, based on evidence gathered in individual and thematic case studies provides a baseline to understand the variety of ways in which universities in our case study cities were engaged in activities directed towards developing sustainable solutions to issues at city level. As illustrated in Table Two, these activities affect a range of populations, and can be seen as engaging with a range of knowledge; engineering, education and health to name a few.

The wider aim of this study is to explore the third mission of the university within the context of the Global South, being mindful that in each city a differing range of challenges emerge which shapes the engagement priorities of the university. Future work will be directed more towards how these important decisions are made, and how the university and city stakeholders do (or do not) work together for this purpose. The current paper allows us to initiate these discussions, asking what is happening now, and who is involved in these activities.

This paper also aimed to interrogate the quadruple helix, the strong working relationship between industry, government, university and civil society. The functioning of these four areas should enable a stronger third mission for the university, as these inter-related networks would

allow interventions to be more focussed to these parts of the community in most need, and to be delivered with policy and technological backing from public and private partnerships. What we found in these case studies was that while this was the case for a few interventions or engagement activities, it was not seen to be the norm. Instead, some arms of the quadruple helix worked closer together than others, often at the cost of engaging fully with all.

For some of the engagement activities, there appeared to be a strong connection between the university and the public, with the university responding to a city issue (e.g. Philippine Normal University running workshops for vulnerable women's groups, or University of Dar-es-Salaam creating an intervention for agriculture). At times, we also see instances of the university working with industry (University of Kurdistan offering expertise in dam construction) although was less frequent, and often involved universities offering consultations, rather than working in collaboration. There are also instances of universities working with other universities (e.g. University of Duhok working with German counterparts), although this did not involve other elements of the quadruple helix. Within the current work, we were not able to locate a case study where all four elements of the quadruple helix were collaborating equally,or were visible.

The case studies described here also were relatively small in scale, detailing pilot work or research being conducted at the university which may go on to have a societal impact. There is scope for government or industry to become closer affiliated to the university, in order for some of the activities to be scaled up; for example the University of Zimbabwe's intervention regarding providing training to local people in the informal economy, or University of Dar-es-Salaam's pilot work in enhancing harvest through integrated farming techniques. We suggest that the ability to scale up these ideas is dependent on the operationalisation of the quadruple helix. However, for this to work, many universities would have to be better connected to local business, policy makers, government and civic society, in order for these ambitions to become a reality. Reflecting on the wider policy of third mission in these cities, we are struck by the comment that while the policies refer generally to the importance of the third mission activities, less is said about the specifics of these engagement types. The lack of specificity and guidelines to engaging with other stakeholders has led to small-scale interventions

and a lack of interventions that utilise the expertise of the university in addressing sustainability issues in their local city.

The ability to work in closer collaboration with city stakeholders, NGOs, industry and local government is integral to the move towards SDG 17. SDG 17 centres on the ability to 'strengthen the means of implementation and revitalise the global partnership for sustainable development'. Tandon and Chakrabarti (2017) describe the significance of SDG 17 in calling for partners, whether they be in business, NGOs, communities, HEIs, governments or other actors (Dodds, Donoghue, & Roesch, 2017) in mobilising and sharing knowledge, expertise and resources in order to achieve the desired outcomes. The partnerships developed can be based around one issue or can have overarching collaborative power. The success of a partnership, they argue, is based on utilising different interests, perspectives, resources to understand the problem and create a sustainable solution.

For these global challenges and for the sustainable development goals to be achieved, it is clear that there are some barriers to be overcome, to ensure that universities in the Global South are better integrated into the wider socio-economic system (Preece et al, 2012, Saad & Zawdie, 2008), and to become better able to utilise knowledge exchange to interested parties. What these particular barriers are, and how they can be overcome is likely to differ across the different study site, although we are confident that there will be overarching narratives across the different contexts.

Our future work will focus on conducting qualitative fieldwork with city and university stakeholders in the six study sites, and exploring their understanding of the positioning of the university in city decision making, and how to improve the relationships between the city and university in order to better understand whether the quadruple helix model can be replicated in the Global South.

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# The role of fairy tales in affective learning: Enhancing adult literacy and learning in FE and community settings

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*This paper explores the role of fairy tales in relation to literacy, affective learning, self-authoring and narrative quest. The study examines fairy tales in the context of the New Literacy Studies with regard to improving cognitive, linguistic and creative writing skills for adult literacy learners.*

***Keywords:*** *fairy tales, literacy, affective learning, wellbeing, problem-solving, narrative quest, self-authoring, identity work, New Literacy Studies*

## Background

This study explores fairy tales as a means of enhancing literacy and affective learning skills with a focus on adult literacy learners in FE. Underpinning the New Literacy Studies[1] theory, the efficacy of fairy tales

[1]The New Literacy Studies examines literacy as social practice in contrast to traditional notions of literacy as a cognitive, linguistic process. The NLS argues that literacy is plural *'literacies'* and should be studied in a more integrated way that encompasses the cultural, social, historical, digital, scientific, legal and psychological process, acknowledging what individuals 'do' as opposed to only focussing on the autonomous skills of reading and writing.

is demonstrated through oral storytelling, creative writing, role-play and drama (Kole, 2017, pp. 11–13). A programme of work was designed and delivered to include written assignments, questionnaires and case study interviews, where participants progress from a literal understanding of narrative text, to symbolic understanding of plot, character, figurative language and a final creative writing piece on a fairy tale of choice.

Existing as liminal narratives, fairy tales provide a unique structure where duality, conflict and transformation can be examined through self-authoring, identity work and problem-solving. Fairy tales address themes in relation to power, gender, socio-economics and confront the impact of these issues regarding society, communities and individuals. Their multi-layered aspects can also act as a unique construct for interdisciplinary learning between literacy skills and personal social wellbeing.

The multidimensional nature of fairy tales makes them an ideal vehicle for exploring literacy in terms of linguistic and cognitive learning. Fairy tales naturally reflect the hero narrative quest, wherein the character is challenged, endures conflict, takes action and achieves his/her goal. In this context, fairy tales support the learner in finding new methods of resolving challenges and transforming issues in their everyday lives.

This approach is relevant to the implementation of the Sustainable Development Goals (SDGs) insofar as it indicates how adult literacy learning can contribute to a much broader range of interpersonal capacities and their social application. The underlying attention to power relations has implications for learners in that it can enhance their resourcefulness in engaging with a broader change process.

## Literacy singular, plural, ideological and autonomous

As the study explores fairy tales in the context of the New Literacy Studies (NLS), it also proposes arguments in terms of contrasting ideological and autonomous, singular and plural, vernacular and dominant literacies, as well as examining different learning practices in terms of linguistic, cognitive and social affective learning.

Previously educationists assumed that literacy was a single or unitary ‘thing where writers often refer to a single ‘literacy’ and assume readers will recognise this (Lambirth, 2005). Lambirth provides several examples of this unproblematic use of the term from various writers,

discussing assessment of 'literacy', the success of a 'literacy' campaign, the challenge of teaching 'literacy' and how scholars work in early 'literacy'. In all these examples the singular term is used whereas, from a socio-cultural view, literacy is seen not as a singular thing but in the plural as 'literacies' (Lankshear & Knobel, 2011).

Scribner and Cole (1981) provide a persuasive argument that 'literacies' in the plural comprise contextual practices that people 'engage' in rather than skills that they apply. In particular, the work of Street (1984) has contributed to an understanding of the notion of multiple literacies constructed in particular contexts and situations.

These literacies according to Street are routines that people engage in at home, socially or through their work or learning environment. Street (1984) contributed to a view of literacy as a plural concept and also coined two terms: 'ideological' and 'autonomous' literacy. Street's (1984) study 'initiated a paradigmatic revolution', which counteracted a skills-based notion of literacy (Bartlett & Holland, 2002, p. 11) by arguing that literacy is always embedded within social institutions and is bound by political, cultural and historical contexts.

The term 'ideological' (Street 1984) refers to the interactions of power around reading and writing and the term 'autonomous' refers to a view in which literacy is seen as a unitary concept, without reference to contexts. An autonomous view works from the assumption that literacy will affect individual cognition and success in the world leading, for example, to an improved economic position (Street, 2005). According to Street (1984) there are assumptions in the autonomous model presented, as if the views are neutral and taken-for-granted.

Street (1984) argues that we need to reconceptualise literacy as an ideological construct rather than an autonomous skill. This re-conceptualisation of the notion of literacy is one of the key reasons why a socio-cultural research approach is significant. From a social practice perspective therefore this research acknowledges the challenges of a skills-based literacy standpoint and suggests that 'autonomous' views of literacy continue to dominate institutional educational practices, imposing conceptions of literacy. In this study therefore a broader understanding of literacy practices is underpinned through social and cultural contexts moving beyond an autonomous conception of literacy as a neutral and technical skill.

## New Literacy Studies and identity work

According to Gee (2012) the way we behave, interact, think, value, believe, speak and write are accepted as examples of performing particular identities. This notion of performing identity was also emphasised by Moje and Luke who cited Norton and Toohey (2009, p. 415):

> *When a language learner writes a poem, a letter, or an academic essay, he/she considers not only the demands of the task but how much of his/her history will be considered relevant to this literacy act.*

Language learning engages the identities of learners because language itself is not only a linguistic system of signs and symbols; it is also a complex social practice in which the value and meaning ascribed to an utterance, are determined in part by the value and meaning ascribed to the person who speaks.

Norton and Toohey's (*ibid*) quotation emphasises the idea of production of identity through literacy practices or literacy practices as a way of exploring identity. Identity is seen as not only multiple and malleable but is also about an individual taking an 'active' part in producing and performing their own identities to influence their social world. From this position, according to Greenhow, Robelia and Hughes (2009, pp. 123–4) identity is:

> *dynamic, self-reflective and performative, rather than something that just is, or that we develop into and sustain.*

This study therefore supports these theories with participants exploring identity work and self-authoring through discussion, interviews and written assignments in the context of fairy tales underpinning the links between language learning and identity (Kole, 2017, pp. 269–281).

As these writers suggested, there is an ongoing process of active production and mediation of identity even though the possibilities of authoring are bounded by constraints and the need to draw on existing experiences.

Drawing on a number of theoretical traditions, Moje et al. (2009) argue that the concept of identity is an active one focussed on the metaphor of identity as narrative. Moje suggested that this metaphor

is a prominent one with theorists who have argued that identities are not only represented but are constructed in and through stories. What is particularly significant here is the notion of the narrative production of identity at 'two' levels. Moje et al (ibid) argue that people 'narrate' stories and also 'perform' their identity concurrently. The context and interaction with the audience are as significant as the narrative itself.

Pahl and Rowsell (2012) having examined the active nature of literacy and identity through the New Literacy Studies (NLS) argue that ideas about identity are central to research and theory in this field. They emphasise that an important idea in the NLS, is a shift from viewing identities as individually produced, to viewing identities as 'in practice' (Pahl & Rowsell, 2012). The authors note that not only do we express identity through language but also:

> *through our dress, our artefacts, our web presence, etc. in other words, we create our identity through our social practices*
>
> (Pahl & Rowsell, 2012, p. 114)

Many studies have focussed on the notion of literacy identities in practice, examples include research focussed on digital literacy and identity (Merchant 2005; 2006; Davies & Tatar, 2012), studies comparing the disjuncture between schools and everyday literacies (Moje, Ciechanowski & Kramer, 2004) and studies in classrooms (Hirst, 2004; Leander, 2002).

In addition, Pahl and Rowsell (2007) introduced the notion of 'sedimented identities' in relation to literacy practices, for example, where the social, economic and historical experiences are viewed as part of the learner's identity and therefore part of the literacy learning process. This notion can also be applied to artefacts or narratives and emphasises the multi-faceted complexity of identity work and literacy in the NLS tradition.

McCarthey and Moje (2002) explain how available literacy practices can constrain and undermine identities, as well as providing chances to acquire new identities. The emphasis on active production of identity has led to the use of the term 'identity work' in many studies Bartlett (2005), Merchant (2005) and Comber and Nixon (2004). This study therefore integrates these theories underpinning identity as a socially situated practice.

### *New Literacy Studies (NLS) fairy tales and space–time*

Multimodal literacies have thus become a current focus through shifts from written to visual texts (Pahl & Rowsell, 2010) with digital literacy, electronic texts and media technology environments dominating literacy practices (Merchant, 2009). As theories have diversified there has been an expansion in NLS research particularly on ideas about space or place and how these aspects interact with literacies (Leander & Sheehy, 2004).

Space and place help to create human identities (Scollon & Scollon, 2003) and where literacy practices take place can allow for more nuanced perspectives of meaning-making, for example, a literacy class set in a community hall would provide a different learning experience to one delivered in a formal classroom setting. Space is generally seen as a more abstract concept than place, although Cresswell (2004) acknowledged that people use the terms 'space' and 'place' interchangeably. Theorisations about literacy and space have been researched and include investigations of classroom spaces, (Leander & Sheehy 2004; Clark, 2010; Burnett, 2011) and online, off-line spaces (Leander & McKim, 2003).

Literacy events help to generate the nature and quality of space, which also includes physical, intellectual, social and emotional space as all of these aspects are essential for supporting learning (Kole, 2017, pp. 200–207). Rowe (2008) a socio-cultural scholar interested in the interface of space and literacy practices draws on Le Febvre's work to argue that spatial and material situations, shape literacy events. Rowe argues that writing and reading events in a library, for instance, may take a different form from those happening in a different social environment.

Literacy practices including values, social situations, physical objects and spaces are discussed in Rowe (2008) underpinning their socio-cultural viewpoint. As material space shapes literacy practices, spatial analysis is therefore required to understand the way human beings coordinate and are coordinated (Gee, 2001).

During interviews for this study, photographs and objects were brought to interviews by participants, as artefacts that supported their current and past memories of literacy events. This reflected the socio-economic and historic events of participants' literacy lives, highlighting the NLS focusses on time–space dimensions where time can also be viewed as an

intrinsic part of literacy practices (Kole, 2017, pp. 295–319). The design of case study interviews for this study was influenced by the material, spatial and embodied aspects of literacy practices with a focus on identities illuminating the multi-faceted nature of participants' literacy experiences and the complexity of both narrating and performing stories grounded in identity work (Kole, 2017, pp. 200–207).

According to Compton-Lilly (2008) we draw on past experience to account for the present and to project into the future. Compton's work drew on Lemke (2001) who used timescales to explain how identity develops longitudinally. Lemke similarly argued that identity formation cannot happen over short time spans and challenged views of time as linear and forward moving. Instead, Lemke suggested we experience time as recursive, for example, we embed experiences from the past into the present. In particular, past experiences are then responsible for taken-for-granted views.

Some scholars have drawn on the notion of 'time–space' or 'space–time' (Leander, 2001) and considered time and space to be inseparable and interrelated. Leander and McKim (2003) explored space as fluid and multiple, linked to time dimensions, drawing on multiple resources related to power and agency. In their view, possibilities always exist for change and reconstruction because of the focus on space–time.

Burgess (2010) discussed educational contexts in relation to time and space, noting that the context is not bounded but includes connections to other spaces and times, therefore from this viewpoint, time and space are interlinked and socially produced.

### *Fairy tales, chronotopes and New Literacy Studies*

In order to examine literacies as a social practice in the context of fairy tales, this study has drawn on the nature of chronotopes (Bakhtin, 1981) and notion of timescales (Lemke, 2001) (Kole, 2017, pp. 156–160). Time–space concepts have helped to highlight how literacies are positioned amongst shifting practices and connect in multiple ways to other contexts across times and locations.

The concept of the chronotope literally means 'time–space' argued in Bakhtin (1981) where notions of time and space made narrative events concrete and define chronotopes as 'the intrinsic connectedness of

temporal and spatial relationships that are artistically expressed in literature'. In 'Dialogic Imagination' Bakhtin analysed novel genres and the role chronotopes play in each genre. Bakhtin described the ancient adventure novel which contains what he terms 'adventure time' which makes no references to everyday aspects of time. In adventure time the hero moves through time and space drawing on significant objects towards a destination (1981, p. 84).

Bakhtin discussed chronotopes in the context of literary criticism, the concept of chronotopes has been applied across other disciplines, within educational research in the NLS tradition. Hirst (2004) drew on chronotopes to analyse the role that temporal and spatial practices played in determining power relations in a particular classroom in which global relations and social identities intermingled.

Van Enk (2007) used chronotopes as a tool for analysing how adult learners' relationships to literacy are accounted for in often inferred conceptions of time and space. Van Enk noted that through this lens, narratives can be analysed in terms of what they suggest about how things might have been or might yet be different.

As NLS is rooted in research, as well as practice, it implies a teaching method that facilitates students and teachers alike, helping them to describe, observe and analyse different literacies, rather than learning and teaching one literacy as given. In Heath's terms (1983) teachers and students therefore become 'ethnographers' exploring various meanings and uses of literacy in the social context of both school and the surrounding communities where 'schooled literacy' becomes one, amongst many of the literacies with which they engage.

Street (1997) indicates therefore that the task to be developed is a two-fold approach: to challenge the dominant representations of literacy; and to develop collaborative research projects that look at the actual literacy practices of community, home and school with a view as Freebody (1995) states to 'effective mutual recognition of these practices in all sites' and for the data thus collected to be fed into teacher training programmes, curricula and pedagogy. The practical consequences and challenges for educationalists in recognising these principles argued in Street's debate on the NLS, where he proposes a checklist of principles on which its application to education would be based about curriculum, pedagogy and assessment (1997, p. 8):

- *Literacy is more complex than curriculum assessment allows where the curricula and assessment reduce literacy to a few simple and mechanistic skills, fail to do justice to the richness and complexity of actual literacy practices in people's lives.*
- *If we want learners to develop and enhance the richness and complexity of literacy practices evident in society at large, then we need curricula and assessment that are themselves rich and complex and based upon research into actual literacy practices.*
- *To develop rich and complex curricula and assessment of literacy we need models of literacy and of pedagogy that capture the richness and complexity of actual literacy practices*

## Participants and materials

In investigating the literacy lives of a group of adult literacy learners, the study drew on the theoretical traditions associated with the NLS paradigm, applying this within the context of fairy tales (Kole, 2017, pp. 156–160). The participants were adult literacy learners recruited through an FE college. Literacy learning support was offered to the participants as part of a study on creative writing to enhance literacy and wellbeing through the narrative quest of fairy tales. Seventeen participants signed up for the study, which was conducted over a five-month period. The study included a mixed age, ability and gender group. Workshops were held once a week for a two-hour duration session, which involved traditional oral story telling through fairy tales, group discussion, written assignments, drama, role-play and case study interviews.

Participants were initially assessed on their literacy levels through BSKB[2] diagnostic assessment tests. The scores from these tests then determined what participants' current literacy status was, in terms of either level 1 or level 2 literacy standard. All participants were working towards a level 2 literacy qualification. Additionally assessment was also conducted through the *Outcome star programme* (2009–2015), which identified social exclusion indicators.

[2]BSKB (Basic Key Skills Builder) is an online assessment tool that provides an initial assessment of literacy levels.

Although the BSKB tests provided assessment on grammar, punctuation and comprehension they were unsatisfactory for testing the students' understanding of symbolic meaning, figurative language and personal social learning. Participants understanding of symbolic meaning and personal social learning was therefore assessed through written assignments, case study interviews, questionnaires and surveys with the aim of improving participants' understanding of symbolic meaning and figurative language within the narrative texts. The study also provided a broader comprehensive investigation of how participants could enhance personal and social skills through creative writing, group discussion, self-authoring and identity work within the context of fairy tales.

### *Method*

The study aimed to test whether fairy tales provided a more effective means than other genres in enabling adult literacy learners to understand symbolic meaning. This involved a process of deconstructing fairy tales to enable literacy learners to produce creative writing of literary merit. The study also aimed to engage learners who had previously underachieved in education by supporting their personal social skills, creative writing and lifelong literacy learning.

A creative writing programme was therefore designed and delivered for adult literacy learners using fairy tales as a scaffold for exploring problem-solving, wellbeing, identity and literacy. Through this literacy programme Propp's (1984, p. 5) narrative stage approach was introduced as a structure to support experiential writing for the participants through themes, character and plot development (Todorov, 1971, pp. 37–44).

The literacy progress of the participants was then traced from literal to symbolic, to the creative writing of fairy tales, through discussion, interviews and written assignments. Social aspects of character and plot development, psychological descriptors and narrative action-based structure was additionally used to support the creation of personal narratives (Propp *ibid*) (Kole, 2017 pp. 164–227). Themes such as parenting, gender, employment, family, relationships, politics, environment and community, emerged as subjects for creative writing tasks with key concept topics also discussed during interviews 'Fairy tales helped me see things through a character and think about what the character might do in that situation' (Kole, 2017, pp. 270, 315).

Narrative hero quest and journeying themes were reflected in participants' writing, particularly regarding the symbolic value of hero/heroine in relation to problem-solving, resilience, perseverance and resolution-based approach. Participants were encouraged to develop characters and plot with the aim of finding solutions to various personal and social conflicts in their lives and within their community environments.

Throughout the study, participants were presented with a range of traditional fairy-tale texts from different authors such as the Grimm brothers, Hans Christian Andersen and Charles Perrault. In the first two assignments the tales of *Rapunzel* and *Bluebeard* were selected for writing. Written assignment work was set to assess participants' ability to distinguish literal from symbolic meaning within fairy tale texts and to support participants in developing a creative writing assignment on a fairy tale of their choice. Assignment work was assessed on ability to analyse themes, symbolic language, grammar, punctuation and comprehension.

At the beginning of the study, many of the participants were at a level one stage of literacy and had minimal experience in essay writing and literacy assignment tasks that required more than a page of writing. Towards the end of the study participants had made significant progress increasing the output of written work in a fluent and comprehensive format. Participants were also able to interpret themes from the texts and express their opinions and ideas of how these themes and symbols could relate to their lives.

The three written assignments involved; a descriptive interpretation of the *Rapunzel* tale, an analysis of the symbols and metaphors within the *Bluebeard* tale and finally a creative writing fairy tale of their own personal choice, either through reinterpreting a traditional tale or creating their own fairy tale. The assignments demonstrated a range of abilities from higher to lower level literacy skills with literacy competencies measured through the Adult Literacy Core Curriculum (2001, pp. 10–36) using this as a benchmark for standard achievement.

The assignments therefore progressed from Assignment 1 (literal interpretation) to Assignment 2 (symbolic interpretation) to Assignment 3 (creative writing).

Participants involved in the research were given the initial first writing assignment in the third week of the study and given an hour to

complete the task under exam conditions. This writing activity asked them to either give their own interpretation of the *Rapunzel* tale or write a character study on one of the characters in the tale. This was an introductory assessment to identify reading and writing ability in terms of cognition, grammar, use of vocabulary, and ability to analyse text for meaning as well as describe or narrate events happening in the story.

The second assignment was delivered in week ten and focussed on the tale of *Bluebeard*. This assignment tested participants' ability to analyse text for symbolic meaning and aimed to assess participants' understanding of figurative language within the text. This exercise was conducted under exam conditions with participants given an hour and fifteen minutes to answer questions on the tale.

The questionnaire was delivered in week twelve and thirteen. As the questionnaire contained qualitative analysis of the participants learning achievements, it was therefore completed over two weeks with participants given an hour each week to complete their questionnaire.

In week seventeen participants completed the third assignment on a creative writing fairy tale of their choice through either reinterpreting a tale that we had previously been covered during the workshops or writing a new tale of their own. This assignment was conducted under exam conditions with participants given an hour and thirty minutes to complete. This writing exercise aimed to test participants writing development to ascertain whether participants had made progress with regard to a shift from literal to symbolic understanding of tales and whether their literacy and creative writing skills had been developed or improved. Finally in week sixteen a survey was carried out with case study interviews conducted the following week.

The participant sample was a diverse group in terms of age, gender, income and ethnicity factors. Participants were interviewed about their reading interests, prior literacy accreditation, aspects of literacy curriculum they found challenging, whether they thought fairy tales had helped them develop themes and understand symbols within the stories and what they considered they had learnt by doing the literacy activities through fairy tales.

As the study underpinned the NLS theory of literacy as a social practice, case study interviews supported this context, with further discussion in relation to questions of identity, personal social, materiality and space,

community, socio-economic issues. The interviews were designed to explore ways in which literacies are intertwined with objects, spaces and relationships with people.

Interviews were conducted at the college and lasted an hour and fifteen minutes approximately. In addition to this, participants also completed notional home study preparatory time of two hours. Part one of the interview was linked to objects, part two was linked to images connected to space and place with part three linked to images representing relationships with people. In each case participants were asked to prepare materials in advance, these were then discussed during interviews. After interviews had taken place the sound recordings were transcribed verbatim and objects brought to the interview were photographed or copied with participants' permission.

The idea of using objects and visual material to engage discussion came from two sources, firstly the findings of Bierman (2008) who acknowledged the value of providing learning intervention programmes to improve social, emotional and academic readiness with culturally disadvantaged groups. The second source was Bakhtin's (1981) theory on chronotopes and language as a dialogic, collaborative exercise.

As the focus of the research was on fairy tales it presented the idea of narrative where the hero carries magical objects on their journey (Bakhtin 1981) The notion of quest and use of magical objects in telling of one's own personal story was an invaluable tool used throughout the case study interviews, representing participants' literacy experiences with personal objects brought to interview, which acted as prompts in telling their literacy stories and personal histories.

Furthermore Bartlett (2007) examined the importance of artefacts in literacy practices and suggested that artefacts can support students in feeling literate. The notion of literacy practice as material, spatial and embodied also reflects Rowe's study (2008) where local literacies draw on material, spatial and embodied resources from everyday life. The objects participants brought to the interview ranged from books, certificates, scarves, pictures of a study space and diagrams of their relationship networks. The notion of journeying as a narrative for participants' literacy lives helped enable focus on the social-cultural context in which these literacies took place.

The table below identifies the different areas of literacy explored through the study; such as time-space, academic, socio-economic/historic and affective:

**Sarah's literacy and personal social education table in context of fairy tales**

| Time–space notion of journey and spatial learning | Academic literacy experiences<br>Problem-solving, thinking skills | Historic, economic, social reflections | PSE, self-authoring, identity work |
|---|---|---|---|
| Completes a 'story plan' before starting written assignment work.<br><br>Does most of her writing sitting at her kitchen table, it's a bright spacious area where she can write comfortably, look out at the garden, watch her fish and look at photos of her family when composing written work.<br><br>Uses online forums i.e. Facebook, Twitter, blogs, etc. for social interaction and to access information on her writing interests such as the environment, history, economics and politics. (317) | 'I enjoyed taking stories apart where you are kind of analysing symbolic meaning.'<br><br>'Liked the *Bluebeard* story and all the different symbols and themes you could find in it'.<br>(317)<br><br>'I enjoyed the *Snow Queen* fairy tale and exploring themes of *warmth* and *cold*'. | 'What interested me when doing the fairy tales was the history and all about the wars and poverty that was going on in Europe at the time.'<br><br>'Fairy tales made me want to read more about the history of Ireland and the Great Famine'.<br><br>'The history of the Great Famine and how children were abandoned, for me related to the *Hansel and Gretel* story.'<br><br>'I linked the social abuse in Hansel and Gretel with the environmental abuse we are doing to the world today.' (317)<br>'I worked in a factory when I was 14 and my grandmother worked there also when she was 8 years old, education was really unimportant then'. | **(artefacts)**<br>Hand-made book from childhood on fairy tales, story plan of assignment, Grimm's<br>Bicentennial fairy tale book. Rowe (2012, p. 9) argues that texts are artefacts that link literacy to the identity of the creator and reinforces the theoretical structure of literacy practices as *material, spatial* and *embodied*.<br><br>'Liked the reality of fairy tales and how they warned you to take heed'.<br><br>'People can talk about past trauma using fairy tales, it's a safe place to explore feelings' (317) |

**Sarah's literacy and PSE practices**

| |
|---|
| Metaphorical phrasing linked to time, journeying and fairy tales: |
| 'Wanted to make the *Hansel and Gretel* story more about the environment and helping the earth and got the inspiration from this from reading about the Great Famine too.' (317) |
| 'Was able to link the social abuse that was going on in *Hansel and Gretel* with the environmental abuse we are doing to the world today.' (318) |
| 'I enjoyed the *Snow Queen* fairy tale and exploring themes of *warmth* and *cold*'. (317) |
| 'Liked the Bluebeard story and all the different symbols and themes you could find in it.' (317) |

## Statistical analysis

As discussed earlier, participants' literacy levels were ascertained through a BKSB standardised diagnostic assessment tool, which identified literacy levels and measured linguistic competency. In relation to this study the BKSB (2013, pp. 1–21) test is referred to as a quantitative assessment tool, which noted participants' literacy levels prior to undertaking the study and was therefore a measurement of the participants' literacy level at that point.

The level 1 BSKB pre-assessment scores for the five case studies were as follows: Katie 65%, Lucy 77%, Sarah 90%, John 80%, James 55% – all students were working towards level 2. In terms of measuring scores, the pass mark for the BSKB level 1 diagnostic assessment test was 45%. Candidates who scored more than fifty per cent in the level 1 diagnostic assessment were deemed eligible to work towards achieving a level 2 qualification (equivalent of GCSE 'c' grade). All the case study participants had therefore successfully scored above fifty per cent with Sarah scoring in the higher ranges. The quantitative BSKB pre-assessment test carried out therefore provided an independent picture of the range of literacy abilities of the group prior to the study.

The questionnaires and written assignments underpinned the research aims, illustrating how the deconstruction of fairy tales can produce better creative writing practice whilst enhancing personal, social wellbeing. The questions also tested the effectiveness of fairy tale genre to enable learners to notice symbolic meaning, to produce creative writing and engage learners who had previously underachieved in formal education programmes (Kole, 2017, pp. 257–313).

In relation to format, the questionnaires consisted of fifteen questions distributed to the seventeen participants who completed the study. Questions 1–6 were scored from 0–5 with 5 being the highest mark, questions 7–10 were scored from 0–10 with 10 being the highest mark. These specific questions identified participants learning progress and understanding, in relation to figurative language, creative writing, themes, symbolism and character. Questions 11–15 assess participants' individual responses to learning styles (Kole, 2017, p. 288).

**Table 1 Scores on the questionnaire (both groups)**

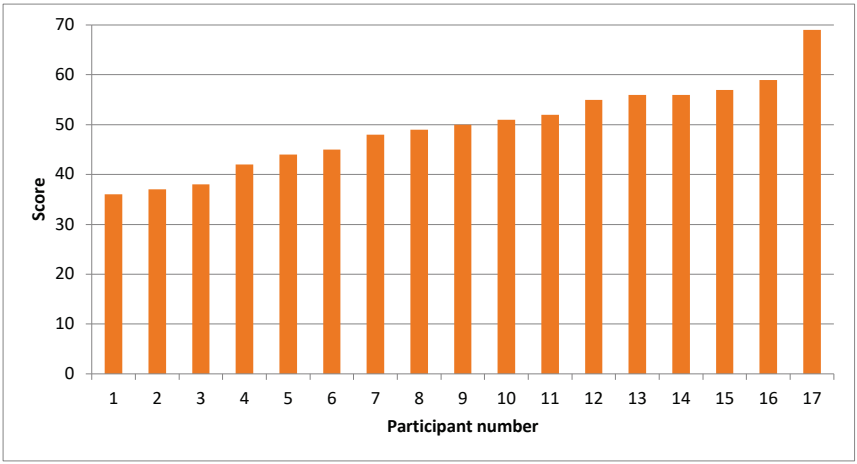


Table 1 is presented in ascending order of result scores from the questionnaire assessment, which was marked out of 74%, with Katie at 37%, being the lowest score and Sarah (69%) being the highest score.

The standard deviation at 8.77 identifies a dispersed skew range from Katie at 37% to Sarah at 69% reflecting a varied result score from competent to highly exceptional.

Outcomes from questions 1–5 and 7–10 were evaluated through a quantitative approach where questions 1–5 identified themes, symbols, metaphors and simile with 95% of participants demonstrating that they had understood these concepts through successful completion of literacy exercises such as cloze passage procedure sentences and paragraph writing (Kole, 2017, pp. 285–289).

Qualitative analysis was used to assess questions 6 and 11–15, these questions identified participants' learning styles as: 80% visual, 10% auditory, 5% literal and 5% kinaesthetic. In relation to interpreting themes, 90% of participants felt more confident and 10% were unsure of analysing themes in fairy tales. Themes within the context of fairy tales were explored in question 7, with participants acquiring knowledge and understanding in relation to character and plot development. Questions 8 and 9 supported the use of deconstruction of fairy tales to improve creative writing practice (Kole, 2017, p. 14).

Further analysis of participants understanding of figurative language and literary techniques were assessed in question 10, which incorporated the reading of Valentine by Carol Ann Duffy with participants identifying themes, symbolism, figurative language and literary techniques within the poem (Kole, 2017, pp. 286–290 no.10–11).

Choice of learning style was also explored in question 11 in relation to the Valentine poem, this time through an online website presenting a more visual–audio presentation of the poem and experience of literacy learning (Kole, 2017, pp. 286–291).

In relation to questions 12–15, participants provided self-assessment of their acquired knowledge and understanding of themes, figurative language, challenging and less challenging exercises and efficacy of visual resources throughout the study. This confirmed the efficacy of fairy tales for identifying and understanding symbolism and improving lifelong literacy learning (Kole, 2017, p. 14).

From the questionnaire, in relation to using figurative language in writing, 95% of participants reported that they were more confident in this area with 5% stating that they were unsure of figurative language. From the visual resources included as part of the study's learning resources such as PowerPoint on 'Narrative Structure, Plot and Character', 90% stated that the visual resources improved their creative writing practices with 10% of participants reporting that they were unsure about visual resources supporting their creative writing practices. Participants identified that YouTube and other interactive literacy websites supported their literacy learning progress throughout the study.

From the questionnaire all the participants identified the second assignment assessment on the Bluebeard tale as the most challenging

writing exercise. This was due to the requirement to symbolically analyse characters and objects in the tale and identify metaphors, addressing the significance of fairy tales to enable learners to identify and understand symbolic meaning. Participants had to deconstruct the tale and analyse what each character and object represented.

In completing the second assignment participants identified the Bluebeard character as a predator who represented the social dangers a young person might encounter when growing up within a community. The youngest sister symbolised a naivety and innocence in the face of this danger, with the older sisters reflecting the knowing insightfulness of the psyche, who warn against romanticising the predator. Finally the 'key' represented knowing, inquiry and truth with the need for investigation and questioning identified as 'keys' to the doors of knowing and truth in the tale.

On questions relating to the most enjoyable part of the project, fifteen participants reported drama scripts and role-play exercises, one participant identified interactive class discussion on fairy tale themes and a further participant reported listening to classical music on fairy tale themes (Kole, 2017, p. 269).

## Results from surveys

The feedback surveys contained biographical data, personal, social and socio-economic information. From the surveys participants who had previously underachieved in mainstream education identified the value of creative writing practices through fairy tales and reported an increased understanding of literary devices, improved problem-solving, and wellbeing all of which underpinned the research aims. Surveys also endorsed the NLS theory in addressing issues that highlighted literacy as a socio-economic and culturally situated practice (Kole, 2017, p. 292:1) with narrative inquiry supporting the use of surveys to explore participants' identity through personal stories, allowing the voice of the participant to be heard (Clandinnen & Connelly, 2000, p. 20) 'narrative inquiry is stories lived and told'.

### *Results from written assignments and case study interviews*

Written assignments demonstrated participants' learning progress from literal to symbolic understanding of text, to a creative writing assignment. On completion of the study participants could therefore

incorporate metaphors and similes into their writing practices, deconstruct texts and identify symbolic meaning within texts more effectively. Participants were able to successfully write their own original fairy tale, scaffolded through a narrative structure, based on the concept of Propp's (1968, p. 20) functions; initial adverse event, test, tasks, help, fight, victory, final reward. Participants were able to explore these narrative functions and develop characters with resilience and ability to cope with adversity.

Case study interviews allowed participants to explore themes of identity, self-authoring and problem-solving, highlighting literacies as multi-framed, fluid and collaborative in the nature of social practice. Interviews provided insights into the trajectories of literacies through time and space, underpinning the multiplicity and fluid nature of literacy lives. Participants could therefore identify with the Hansel and Gretel or Rapunzel tales and recognise themes of abandonment, isolation and parental responsibility and explore solutions to address these issues.

## Summary of results

The outcomes from the study indicated significant development in participants' learning progress due to the specific links made between literacy, problem-solving and personal social learning (Kole, 2017, pp. 201–204). Throughout the study, opportunities were provided to engage participants in discussion and interpretation of personal narratives, promoting the development of character traits, such as resilience, reasoning and insightfulness (Pennbaker, 2000).

Themes explored in writing and case study interviews involved topics of interest to the participants, such as family, gender roles, community, environment, political and generational conflicts, where similarities with today's problems were identified in the specific coping strategies adopted by the hero/heroine of the story and his/her social and emotional development.

This research tested a New Literacy Studies approach in relation to traditional fairy tales with adult literacy learners, with the aim of helping learners enhance literacy skills, problem-solving and affective learning. From the case studies and surveys, participants reported; improved understanding of symbolism and metaphor within story, increased

understanding of figurative language, improved linguistic skills, cognitive abilities, enhanced problem-solving, self-esteem and personal wellbeing.

After completing the literacy programme, participants were able to identify generic themes in texts, analyse symbolic meaning, improve linguistic, cognitive and affective skills through writing tasks within the context of fairy tale genre. Indicators of success also included, gaining greater confidence in writing creatively, improved engagement in group discussion and debate.

The study addressed the research questions validating the role of fairy tale genre in supporting adult literacy learning, enabling learners to more readily identify symbolic meaning within text, incorporate metaphor and simile in writing, deconstruct text and write creatively. This proved significant in engaging learners who had previously underachieved in mainstream education, allowing them to explore identity, self-authoring and problem-solving in the context of narrative tales.

Collaborative group work underpinned a holistic, inclusive environment where participants could positively engage in discussion, storytelling and writing. Participants were able to examine themes in everyday lives, explore cultural codes, socio-historical learning, engage in debate on environmental, economic, political issues all of which supported the promotion of citizenship, employability and lifelong literacy learning.

The study provided opportunities to develop traditional oral storytelling through fairy tale, which supported the speaking and listening tasks required for participants' literacy level 2 qualification. This corroborated the progress of literacy learning for participants, many of whom had experienced social exclusion and academic underachievement in mainstream education.

Personal and social life goals were also acknowledged as motivational to participant's literacy learning, inspiring them towards achieving academic success, for example, achieving literacy qualifications to gain family and peer approval. Issues on social exclusion, economic poverty and trauma through political conflict were additionally identified as having impacted on participants' literacy learning (Kole, 2017, pp. 315–316).

The case study interviews examined identity across time and space underpinning a multiple nuanced view of literacy as a social practice (Bakhtin, 1981, p. 84) By incorporating an affective domain, participants

had an opportunity to focus on the emotional experience of learning, separate from the social or academic learning concept. Each of these themes illuminated a different aspect of participants' literacy lives.

Firstly, the academic identified a linear aspect of learning, secondly the fluid concept of identity moving across time and space encompassing past, present and future lives represented a cyclical aspect and finally the affective domain explored the personal individual's experience of literacy. All three encompassed different dimensions of literacy learning and provided a layered, varied and rich account of participants' literacy lives. The study therefore acknowledged participants' agentic action in their ability to reclaim, transform and reinvent the self, regardless of adverse socio-economic environments.

## Conclusions

In conclusion this study fostered the important role of fairy tales in enhancing literacy in relation to understanding linguistic devices, symbolic meaning, personal wellbeing, and affective skills for adult literacy learners. The study introduced themes of journeying in a linear trajectory towards academic learning goals and explored identities in the movement between participants' past and present lives. A focus was provided that identified narrative hero quest in everyday life situations, embedding fairy tales in socio-historic and cultural codes.

The use of artefacts in case study interviews supported literacy experiences and elicited insights into participants' broader literacy lives. By principally focussing on personal narratives through fairy tales the study promoted narrative inquiry through considering stories as lived and told experiences, fostering participants learning 'to tell, relive and retell the stories of experience that make up their lives' (Clandinnen & Connelly, 2000, p. 20).

As a holistic literacy practice, the study implemented a learning programme that addressed the balance between autonomous skills-based literacy, greater social inclusion and affective learning. This positively enhanced literacy and personal wellbeing signalling a regenisis of self-authoring, identity and empowerment in the context of fairy tales.

> *For me this represents butterflies; a symbol of hope, it starts as a caterpillar … then turns into something else, it might take a while to get to be a butterfly … but you can get there … you can feel freer … yes, this is light, this is colour, this is joy. (Participant: L)*

(Kole, 2017, p. 295)

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## About the author

***Karly Kole*** has been teaching adult literacy in FE and community education for over ten years. Her research at Ulster University involves the reworking and redrafting of fairy tales to enhance literacy, wellbeing and creative writing. She is particularly interested in exploring how fairy tales develop psychological, social, cognitive and literal skills providing a more inclusive and integrated approach to learning.

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# Literacy, lifelong learning and sustainable development

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*Sustainable Development Goal (SDG) 4 calls on countries to ensure inclusive and equitable quality education and promote lifelong learning opportunities for all. Sub-goal 4.6 aims to ensure that all youth and a substantial proportion of adults of both genders achieve literacy and numeracy, with literacy being regarded indispensable not only for the achievement of SDG 4 but also for the other 16 SDGs, specifically those relating to health and wellbeing, gender equality, active citizenship, income generation and responsible consumption and production. However, the potential of achieving literacy can only be reached if it is approached from a lifelong learning perspective; therefore literacy learning activities should be offered as part of a lifelong learning framework.*

*This article describes how the Kha Ri Gude Literacy Campaign in South Africa, conceptualised within a lifelong learning framework, extended its literacy curriculum to engender agency and empowerment among the national target of adult learners who, as a result of the legacy of apartheid in South Africa, had little or no education. It examines how, through conceptualising literacy curricula content around the (local, national and international) development goals, it is possible to use literacy instruction as a catalyst to effect transformation and social change.*

*The article draws on the mixed methods approach followed by the research to show learners' perceptions of the social, economic and developmental opportunities afforded by literacy acquisition.*

***Keywords:*** *South Africa; literacy; Kha Ri Gude campaign; empowerment; sustainable development goals; lifelong learning*

## Lifelong learning and sustainable development

The continued prevalence of illiteracy in post-apartheid South Africa was found to have negative effects on development and social transformation, which prompted the government to launch the Kha Ri Gude[1] (Let Us Learn) Adult Literacy Campaign in 2008. The campaign aimed to address the issues of literacy and basic education, which are considered to be essential enablers for developing South Africa's poor, expanding their life choices (Department of Education, 1997, 2000, 2006), enhancing their participation in the social aspects of their lives, providing a foundation for justice and equality, and redressing historical imbalances (McKay, 2012, p. 5). In line with the National Education Policy Act 27 of 1996 (Department of Education, 1996), the campaign plan, which aimed to reach 4,7 million adult illiterates, included strategies for targeting women, rural inhabitants, out-of-school youth, the unemployed, prisoners, and adults with disabilities (McKay, 2015).

This paper aims to show the relationship between literacy as a foundational component of lifelong learning and the achievement of sustainable development goals (SDGs). I argue that through a deliberate effort to embed the teaching of reading, writing and numeracy into themes framed by (local, national and international) development imperatives, it is possible to enhance the impact on the developmental opportunities afforded by literacy.

I used a concurrent multi-method approach that combined obtaining qualitative and quantitative data in the same research enterprise. This entailed a quantitative analysis of the survey responses obtained from a sample of 485 941 literacy learners and a qualitative content analysis

[1]Kha Ri Gude (pronounced car-ri-goody) is Tshivenda for 'let us learn'.

of 2 032 educators' monthly journals. Both sets of data were used to explore the learners' perceptions of the impact of literacy acquisition on the social, economic and developmental aspects of their lives.

I begin the article by looking at literacy from a lifelong learning perspective and then explore the rationale of using the SDGs to inform the thematic organisation of the learners' literacy materials. In the latter part of the paper, I discuss the survey of 485 941 learners, showing how they perceived the impact of literacy and numeracy on their lives. The survey findings are juxtaposed with the analysis of the narratives contained in the educators' monthly journals. Analsying educators' narratives have given rise to critical information of the campaigns' operations and impact (McKay & Romm, 2015).

In the following section, I explore SDG 4's call for the 'promotion of lifelong learning opportunities for all' in relation to SDG sub-goal 4.6, which aims to ensure that 'all youth and a substantial proportion of adults achieve literacy and numeracy' (United Nations, 2015, p. 21).

## Literacy in the context of lifelong learning

In a country such as South Africa where there are great inequalities, lifelong learning is regarded not only as a philosophy or an organising framework for learning but as a particularly important process for those who have been excluded from acquiring or have failed to acquire basic competences through formal schooling. In terms of a lifelong learning paradigm, literacy and numeracy are considered essential components of lifelong learning and as critical foundational components for further learning. The expanded remit for literacy in the United Nations post-2015 development agenda makes a case for literacy programmes that are structured in terms of levels of competency that would allow for alternative learning pathways that meet a diversity of formal and non-formal learning needs. It also presupposes that national policies incorporate literacy and basic education into their educational offerings and that these are calibrated in their national qualifications frameworks. Such calibration would require literacy standards and standardised tools to assess literacy proficiency and to monitor and validate learning progress and outcomes.

The lifelong learning tradition has a long history. Hanemann (2015, p. 300) explains that its origins can be traced back to UNESCO's Faure

Report on *Learning to be* (Faure, Herrera, Kaddoura, Lopes, Petrovsky, Rahnema. & Champion Ward, 1972) and the UNESCO Delors Report on *Learning: The treasure within* (Delors et al., 1996) both of which envisage learning as a lifelong process in which all could learn according to their needs and interests, anywhere and at any time.

Hanemann (2015, pp. 295–300), of the UNESCO Institute for Lifelong Learning, offers an analytical framework for literacy from a lifelong learning perspective, comprising the following three closely interrelated dimensions:

Firstly, she envisages literacy as a lifelong learning process with literacy learning as a continuous activity leading to different proficiency levels. For this reason, she argues, it is meaningless to describe someone as being either 'literate' or 'illiterate' because literacy proficiency levels are part of a learning continuum. In acknowledging the varying levels of proficiency, the literacy and numeracy instruction of the Kha Ri Gude Literacy Campaign was registered as foundational competences on the South African National Qualifications Framework (NQF) at a level equivalent to Grade 3 of schooling; with the NQF making provision for subsequent more complex levels of literacy and numeracy.

Secondly, she argues that literacy is a life-wide process, which implies that people use and develop their reading and writing skills in different ways across a wide range of places or spaces—at home or in the broader community. In accordance with this, the literacy campaign offered its formal teaching across a range of non-formal learning sites and drew on a range of generative themes that were life-wide and cut across sectors such as health, work, social security, environment and culture.

Thirdly, she contends that literacy needs to be regarded as part of holistic, sector-wide and cross-sectoral reforms that promote the development of national lifelong learning systems. As she argues, 'within a lifelong learning perspective, literacy and numeracy are viewed as foundation skills which are the core of basic education and indispensable to full participation in society' (Hanemann, 2015, p. 295). The Kha Ri Gude Campaign recognised that literacy and numeracy were critical foundational skills that learners needed to access further learning and that facilitated the transition of learners to Adult Basic Education and Training level 2 (equivalent to Grade 5 of formal schooling) or other areas of education and training (McKay, 2015. p. 383).

The UNESCO Institute for Lifelong Learning's (2017b, p.2)) policy brief offers the following succinct explanation of the three-dimensional model for lifelong literacy:

> *Lifelong literacy covers the full spectrum of lifelong and life-wide learning and involves a continuum of proficiency levels that require institutionalized learning systems which are flexible and support integrated approaches at all stages of a person's life and in a diversity of life situations. … [It] seeks to associate literacy learning with other essential development tasks by making literacy part of national development strategies. … [It] requires a cross sectoral approach cutting across all development-relevant areas (health, agriculture, labor, social security, environment, culture, etc.), beyond the education sector.*

In this way, UNESCO (2017b) highlights the role that literacy plays in lifelong learning across a range of development areas and as a crucial catalyst in achieving the other 16 SDGs. However, using literacy as a vehicle for the achievement of SDG 4 ('promotion of lifelong learning opportunities for all') and sub-goal 4.6 ('all youth and a substantial proportion of adults achieve literacy and numeracy') (United Nations, 2015, p. 21) are not without challenges. UNESCO (2009, p. 67) refers to multiple and structural reasons for the low and inequitable access to adult learning and education of the poor (in the global South), particularly women and rural and minority groups, restricting their participation in adult education programmes. There are various economic, political, social and structural barriers that cause unequal participation, and these are broadly classified into three types of barriers that impact on adult learning, namely institutional, situational and dispositional (UNESCO, 2009).

*Institutional barriers* include constraints such as the lack of opportunity, and the available time or challenges associated with the place of learning. These constraints impact on the poor and the least educated who do not have the resources or the right to access learning. The South African campaign endeavoured to overcome such barriers by offering classes and learners' support materials at no cost to learners. This was an essential feature of the campaign's mobilisation strategy. In addition, to ensure that the learning sites were accessible to and convenient for learners and that travel costs would be minimal, the learners were asked to determine the learning venues.

*Situational barriers* arise from and are linked to an individuals' life-stage. These barriers usually relate to having insufficient time for learning due to family or work obligations. In consideration of the absence of childcare facilities, the literacy campaign permitted mothers to bring their children to classes and required the learners to determine the times of classes so as to fit into their daily schedules.

*Dispositional barriers* refer to socio-psycho factors that may impede an individual's decision to participate in learning. Dispositional barriers are prevalent among those with low levels of literacy and also the elderly. Often these barriers are rooted in ambivalent memories of initial education or previous failure (McKay, 2015). Studies, including those of Street (2014, p. 14) and Aitchison, McKay and Northedge (2015, p. 51), refer to the reluctance of adults to attend literacy classes because of previous negative experiences of failed schooling. In addition, adult learners may be embarrassed about being illiterate or may be afraid of losing their jobs or being overlooked when it comes to considering people for responsible positions in the clubs or committees they belong to. Many illiterate adults reside in rural and informal settlements where the focus is generally not on literacy enrichment (Shrestha & Krolak, 2015); therefore the culture of reading and learning needs to be developed and nurtured.

In an endeavour to mitigate the various barriers to participation, the campaign used targeted community marketing and passing of information by word of mouth to mobilise learners. In addition, the first theme of the learners' materials stimulated learners' interest in that it dealt with situational and dispositional (socio-psycho) barriers to learning. In the latter part of this article, I discuss how the theme *I am learning* assisted in overcoming the many barriers that influence an individual's decision to participate in and continue with learning. In addition, the campaign harnessed the African ethos of ubuntu by encouraging learners to collaborate with and support their learning peers (Biraimah, 2016; Brock-Utne, 2016; Oviawe, 2016). This cooperative approach to learning contributed to high participation rates (McKay, 2015) and gave rise to a range of collaborative learner projects.

## The context of literacy and the SDGs

The SDGs and their precursors, the Millenium Development Goals (MDGs), draw attention to the expanded remit for literacy as an

essential development tool to enable people to survive, participate and develop, and to enable active citizenship, improved health and livelihood, and gender equality (UNESCO, 2017a, b, c).

In this respect, Oghenekohwo and Frank-Optu (2017, p. 130) contend that literacy education is central to the achievement of all 17 SDGs, stating that literacy education is essential to decrease the vulnerability of individuals and communities (SDGs 1, 2, 3, 4, 5, 6, 7, 10 and 16), as well as to increase people's capacity for participation in a knowledge-driven system (SDGs 8, 9, 11, 12, 13, 14, 15 and 17). They argue that literacy education, as an investment in human capital, is the first step towards achieving the SDGs, noting that by incorporating learning content into literacy programmes that deal with, for example, the environment, production, income generation and social justice, it will be possible to enhance sustainable development. They therefore recommend that literacy education should form part of all government policies that are aimed at promoting development.

In similar vein, Torres (2004, p. 16) considers the developmental goals of learning:

> *Education and learning are not objectives in themselves. They are means for personal, family and community development, for active citizenship building, for improving the lives of people, and for improving the world in which we live. Thus, they must be explicitly framed within and oriented toward social transformation and human development.*

With a Gini coefficient of 0.64 for males and 0.68 for females and 30% of the population unemployed, South Africa has one of the highest rates of inequality in the world (Statistics South Africa, 2017). The Kha Ri Gude literacy campaign was thus conceived as part of a suite of government interventions targeting inequality and poverty in South Africa, inspired by the commonly held understanding that adult literacy contributes to personal empowerment, economic wellbeing, community cohesion and societal development. It is argued that literacy acquisition contributes to poverty alleviation, mitigates HIV and AIDS, contributes to preserving and sustaining the environment and raises an awareness of human rights and the need to combat racism and xenophobia (UNESCO, 2009, p. 43).

Torres (2004, p. 93) cautions that while promoting literacy is viewed as a key strategy to alleviate poverty, it must be remembered that poverty is not the result of illiteracy but very much the contrary'. Hence she points out that the most effective way to deal with poverty is to deal with the structural, economic and political factors that generate and reproduce it on a national and global scale.

Keeping caution in mind, the campaign nevertheless proceeded with the interest of directing the literacy programme to give effect to the development agenda by framing the teaching of reading, writing and numeracy in accordance with development-related themes in order to optimise the social, economic and developmental opportunities afforded by literacy acquisition. In line with the recommendations of Piper, Zuilkowski, Dubeck, Jepkemei, and King (2018), the campaign opted to use pre-developed literacy materials[2] together with educator notes and the support of a mentor or coach (i.e. one of the campaign supervisors) to present the programme at some 40 000 non-formal adult learning sites across the country. The materials drew on the MDGs and SDGs with the curriculum highlighting the themes of, for example, entrepreneurship, HIV and AIDS, gender, democracy, human rights, environmental awareness (United Nations, 2000, 2015), social justice and redress[3] to encourage learners to think about related matters and to make applications in their everyday lives.

In her evaluation of the campaign, Osman (2009, p. 31) comments on the thematic approach as follows:

> *While teaching the fundamentals of reading, writing and arithmetic … the materials simultaneously teach a range of life skills such as HIV/AIDS, anti-xenophobia, budgeting, environmental education, nutrition, hygiene and health, and livelihoods, active citizenship and ongoing lifelong learning*.

The literacy campaign also provided an opportunity to heighten learners' awareness of gender-based violence, which is widespread in South African society (Jewkes, Levin, Mbananga, & Bradshaw, 2002;

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[2]It is recognised that proponents of 'new literacy' studies (Prinsloo & Breier, 1996; Rogers, 2006; Street, 1984, 1995, 2014) argue against the use of pre-developed textual material (primers or workbooks) in teaching literacy.

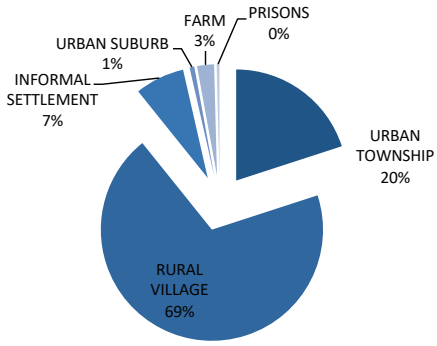
[3]The curriculum included mother-tongue literacy, English as a first additional language and numeracy. The thematic approach was followed to develop the life skills component.

Jewkes, Penn-Kekana, Levin, Ratsaka, & Schrieber, 2001). It attempted to debunk gender stereotypes by encouraging open discussions about the possibilities for women to transcend traditional gender barriers. In discussing the need for education programmes to tackle the alarming statistics of gender violence in South Africa, Mpani and Nsibande (2015, p. 6) draw on the United Nations' (1993) definition of gender violence as 'violence that results in, or is likely to result in, physical, sexual or psychological harm or suffering to women and girls … whether occurring in public or in private life'. As will be shown subsequently, the campaign materials mainstreamed gender in line with SDGs 3 and 6.

In tackling issues of health and wellbeing (SDG 3/MDG 6) and the empowerment of women in relation to healthcare (SDG 5/MDG 3), the campaign focussed on health in the context of development. The World Health Organization (2016, p. v) refers to the health challenges that persist in developing countries, for example, high maternal and child mortality rates, malnutrition and high incidences of communicable diseases such as HIV and AIDS and tuberculosis. It was necessary for the campaign materials to focus on sexual and reproductive health and HIV and AIDS, as well as on the relationship between and the critical impact on children of poverty and malnutrition (Adams et al., 2018) as well as on the prevalence of malnutrition in urban areas—a phenomenon that is acute in urban areas because of limited agricultural land and rampant food prices (Nenguda, 2018).

Figure 1 shows the residential and settlement patterns of the literacy learners. It was necessary to know the learner contexts in order to ensure that the learner materials dealt with issues that were specific to their living situations.

**Figure 1. Distribution of learners by residential type**



The campaign materials were contextualised around problems of poverty in specifically rural and urban townships and informal settlements, dealing with issues related to poor infrastructure, lack of water, sanitation and electricity, poor health and healthcare, HIV and AIDS, malnutrition, low household income and high migration (Aliber, 2003; Bosworth, 2016; Lehohla, 2017; Lind, 2008). Cognisance was also taken of the prevalence of food insecurity which, while high in rural areas, is more extreme in township and urban informal settlements where the cost of living is higher and food prices are out of the reach of poor households (Nenguda, 2018).

The campaign aimed to empower learners to make purposeful choices while acquiring literacy. Most definitions of empowerment that focus on agency refer to people gaining control over decisions and resources that determine their quality of life, and, as Akter et al. (2017, p. 271) point out, 'translating choices into desired actions and outcomes'. It is akin to what Giddens (1991, p. 223–225) terms 'life politics', or the politics of self-actualisation. It is concerned with reducing exploitation, inequality and oppression and focusses on the imperatives of justice, freedom and participation through collective or intersubjective engagement (McKay & Makhanya, 2008). This is analogous to Freire's (2006) aspirational 'pedagogy of hope' according to which literacy helps to shape the trajectories of people's lives (Hanemann & McKay, 2015; Ghose & Mullick, 2015; UNESCO, 2006; Wagner, 2015).

The remainder of this paper sets out the findings relating to the learners' perceptions about the extent to which the literacy campaign's deliberate focus on the MDGs/SDGs helped shape the trajectories of their lives. In doing this, it focusses on the unfolding of the three dimensions of lifelong learning (institutional, situational and dispositional barriers) as explained by UNESCO (2009).

## Research approach

This study used a mixed methods research approach, an approach which is often referred to as a 'third movement' in the evolution of research methodology as a resolution to the quantitative and qualitative paradigm war. Creswell and Garrett (2008) point out that in 'mixing' quantitative and qualitative data, consideration is given to when, where and why methods are mixed and what the added value of 'mixing' methods is. They argue that when a researcher collects 'both quantitative and

qualitative data, merging, linking, or combining of the sources of data, and then conducting research as a single study … the mixed methods research provides more than quantitative or qualitative research alone' (p. 327). The article draws on the complementary strengths of these approaches (Johnson & Onwuegbuzie, 2004; Johnson, Onwuegbuzie, & Turner, 2007; McLafferty & Onwuegbuzi, 2006).

The study followed a 'concurrent mixed' or 'multi-method' approach, gathering qualitative and quantitative data (Morse, 2003) and integrating these to offer a more nuanced understanding of the impact of literacy on learners' lives and the extent to which these benefits correlated with the intent of the MDG/SDG-inspired curriculum within a lifelong learning framework. It was believed that the findings would allow for a closer tailoring of basic education programmes that might be incorporated at the foundation phase and along the lifelong learning continuum.

Both the quantitative and qualitative data were obtained from large data sources as discussed below.

Firstly, I used the data I gathered from 2007 to 2012 when I established and managed the literacy campaign in my capacity as its chief executive officer. This study may therefore be regarded as reflective, with my personal roles having been those of a participant observer and a co-active researcher (McKay & Romm, 2008). As leader of the campaign I had access to letters, emails, official data and reports, and I could interact with learners and other field operatives in the course of my daily work. These data sources provided an important backdrop to the study.

Secondly, I drew on the data emanating from a content analysis of a sample of the journals that 2 032 educators[4] ($n$ = 2 032) had to keep to guide their monthly community of practice meetings. While content analysis is often perceived as a quantitative method in which preconceived items are coded and counted, I regarded my analysis of the educators' journals as following an abductive content analysis approach, which Harnett (2016, p. 7) defines as meaning-making through a three-way engagement with text, individuals and the environment. This, Harnett argues, involves hearing and interpreting 'the intermingled voices' in the context or epistemic space, an engagement that moves

[4]The educators in the campaign were organised into community of practice groupings and were required to maintain journals to be discussed at their meetings. The process is discussed in an article by McKay (2017).

the enterprise from being subjective to being intersubjective. In this way, Harnett contends, content analysis can be transformative in deriving explanations arising from textual analyses that may be used to guide subsequent action. In our managing of the literacy campaign the issues raised in the educators' journals were initially tabled at the meetings between the respective educators and their supervisors and ultimately at the meetings held with the coordinators at which I, as CEO, was present, and at which the issues raised in the journals were indeed used for improving and transforming the campaign strategy at a national level. Moreover, these meetings provided a space for intercoder interpretations of issues through multi-stakeholder engagement.

In analysing the journal content, I followed an innovative abductive approach listening to the intermingled voices of the national coordinators and other stakeholders against the backdrop of my understandings of the context. This enriched my reading and interpretation of the text.

The journals contained a number of themes other than those I had identified, for example, ways of improving teaching or approaching problems associated with absenteeism, but the themes I deal with in this article mainly concern those aspects that I consider to be related to the impact of learning on learners' lives (McKay, 2017). It is, however, possible that other researchers attempting the same exercise might identify other themes as being prominent.

Lastly, I used the quantitative data obtained from the responses of a sample of 485 941 learners' ($n$ = 485 941) assessment portfolios[5] which were captured in 2011[6]. Learners were required to respond to 24 indicators pertaining to how literacy had impacted on their lives (see Table 1 below). The data were processed using the SAS statistical package and various statistical procedures, including Spearman's rank correlation coefficient. The quantitative survey data used were obtained from the responses that

[5]These portfolios contained 10 assessment activities for literacy and 10 for numeracy, which learners completed at various stages in their programme. At the end of the learning programme, the educator surveyed the learners on 24 items that required them to indicate which items resonated with their perception of the impact of the learning on various areas of their lives.

[6]The campaign reached 4.7 million learners in the period 2008–2017. The year 2011 was selected for this study as a stable year with the campaign having overcome initial teething problems or winding down issues, thus providing more reliable data.

the literacy learners gave at the end of the semester when their educator conducted exit interviews to determine which of the 24 indicators (see Table 1) the learners perceived to have improved as a result of their literacy acquisition. The 485 941 learners/respondents were organised into classes of between 12 and 18 learners. They were taught by approximately 32 000 educators, each of whom was responsible for conducting exit interviews with all the learners in their class. In administering the 24-indicator survey during the interviews, the educators were required to read out the following statements to their learners in their mother tongues and tick the aspects with which the learners agreed:

**Table 1. Learner survey on the impact of literacy**

| | | | |
|---|---|---|---|
| 1 | I feel more self-confident. | 13 | I feel that people treat me better. |
| 2 | My life in my family has improved. | 14 | I feel more respected in my family. |
| 3 | I feel more respected in the community. | 15 | I have more friends. |
| 4 | I share what I learn with my family. | 16 | I ask my family to help me with my learning. |
| 5 | I take part in more community issues. | 17 | I can more easily solve problems. |
| 6 | I better understand my child's schooling. | 18 | I understand the importance of eating correctly. |
| 7 | I can help my child with education. | 19 | I have started growing vegetables. |
| 8 | I attend school or other meetings. | 20 | I have improved my position at work (if he/she works). |
| 9 | I better understand health and healthcare. | 21 | I have started some work that helps me to earn. |
| 10 | I can manage money better. | 22 | I would like to carry on learning. |
| 11 | I can use a cellphone or ATM or other device. | 23 | I have encouraged others to join Kha Ri Gude. |
| 12 | I have more books or magazines in my home. | 24 | Other (fill in) |

Note. Reprinted from *I can do it, Learner assessment portfolio*. (DBE, 2011, p. 2).

## Research questions

This study sought to answer the following research questions through a mixed methods approach:

- What did learners perceive was the impact of literacy on their lives?
- What areas of impact did the educators refer to in their journals?
- In what way did the areas of impact correlate with the MDG/SDG-related themes contained in the learning materials?
- What do the areas of impact contribute to our understanding of literacy within a lifelong learning paradigm?

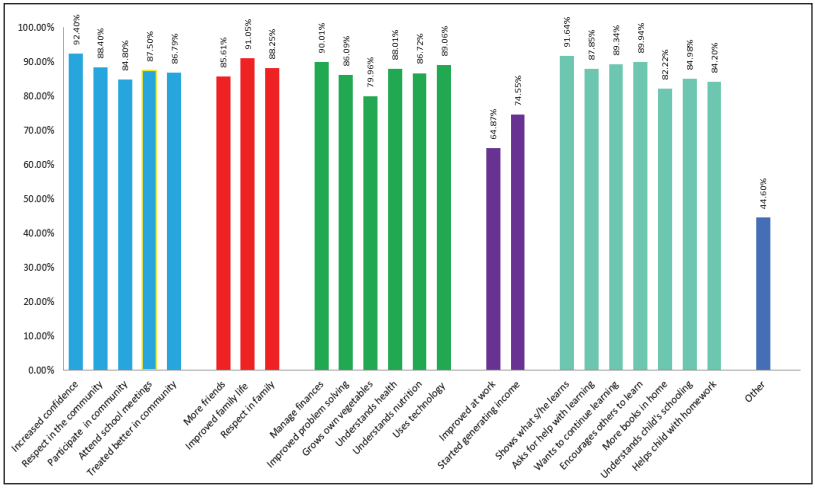
## Findings

### *Perceptions of the impact of literacy*

In this section, I report on the learners' perceptions of the impact of learning on their lives and interpret these against the backdrop of the data obtained from the educators' journals.

I start this section with Figure 2 that graphically displays the findings of the 24-item survey (shown in Table 1). The survey aimed to establish the learners' perceptions of the impact of the literacy campaign on their lives.

**Figure 2: Learners' perceptions (in percentages) of the impact of their learning on various aspects of their lives**



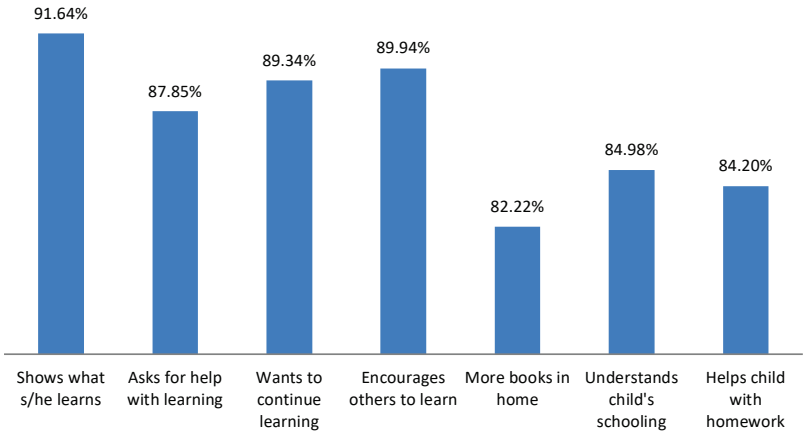
The differently shaded clusters of indicators shown in Figure 2 refer respectively to the following: increased confidence; increased social networks; utility of newly acquired skills; improved income-generation activities; and appreciation of education. The last bar ('Other') refers to additional impacts that are not captured for this study.

The subsequent discussion is arranged according to the themes used to organise the literacy materials (I am learning; My family, my home; Living together, Healthy living; World of work; Our country; The world around us).

## Learners' perceptions of the impact of learning

The first theme in the literacy manual *I am learning* links up with the goal of SDG 4 to 'ensure inclusive and equitable quality education and promote lifelong learning opportunities for all'. It aimed to motivate and encourage the newly enrolled adult learners to persevere with their learning, showing basic education as a human right. The literacy programme assisted the learners in setting out on their journey of lifelong learning by requiring them to deal with the various barriers to learning and to discuss their personal reasons for not attending school in childhood and any reservations about learning they might have, and to explore their learning needs and identify possibilities for enhancing their skills. In addition, the theme aimed to inform parents and carers of the importance of their children's schooling. Importantly, the theme aimed to destigmatise literacy learning. The responses shown in Figure 3 suggest that the first theme contributed to establishing a learning culture among the learners, their families and their peers.

**Figure 3. Learners' perceptions of the impact of learning**



As illustrated in Figure 3, 91.64% of the learners indicated that they showed their books to family members and friends, suggesting that the campaign succeeded in destigmatising literacy learning. A further 89.94% of the learners stated that they encouraged others to learn, with 87.85% of them enlisting the help of friends or family members in completing learning tasks.

The following excerpts taken from the educators' journals suggest that the learners' learning was a shared activity:

> *They share what they are learning with their family at home.*
>
> *Some learners come to class with their lessons already completed ahead of time.*
>
> *They learn with their families.*
>
> *Their family members are eager and interested in coming to classes.*
>
> *Learners ask to bring additional family members to class. Some want to bring their partners and other family members. I tell them they can only enrol in the next semester.*

The campaign aimed to stimulate learners' appetite for lifelong learning. The findings pointed to the desire of learners (89.34%) to continue learning. In addition, 82.22% indicated that they had more reading materials, books and magazines in their homes. This is notwithstanding the fact that many of the learners resided in rural and informal settlements, where the focus is generally not on literacy enrichment.

The educators' journals referred to the agency and cooperation of learners in establishing class committees, finding convenient learning venues, recruiting new learners and ensuring regular attendance of their peers. This also helped to mitigate structural and institutional challenges that literacy learners often face. Moreover, the role of learners in organising their programmes was significant in narrowing the divide between formal and non-formal learning because this formal programme was presented at non-formal learning sites such as in homes or under trees—at sites and times determined by the learners themselves.

The theme also intended to heighten awareness of parenting techniques and reinforced strategies for supervising children's homework. The

exit survey showed that 84.20% of the learners assisted children with homework and a further 84.98% indicated that they were more knowledgeable about their children's education.

Osman (2009, p. 34), in her review of the literacy campaign, notes that the adult 'learners appeared to be very keen to learn … they indicated that they felt that the programme was beneficial to them in that it assisted them to help the children with their homework, and also provided an opportunity for the children to help the older caregivers with theirs'.

The following notes taken from the educators' journals revealed the impact that literacy learning had on the schooling of the learners' children.

> *They can help their children with their homework because they know how to read.*
>
> *They can write the minutes of school meetings.*
>
> *Their children were motivated to share their knowledge with their families and neighbours.*

The converse was also reflected in the educators' journals. The intergenerational nature of the learning meant that it was not unusual for children to visit their parents' literacy classes to obtain information on how they could better assist their parents with their homework. As one educator explained in her journal:

> *Children come to class to check on their parents' marks and to check their answers [to the assessment activities] and to find out what homework they have to do. They regularly check on how well their parents are doing.*
>
> *Learners are now able to help their children with homework, and their children also help them with their work.*

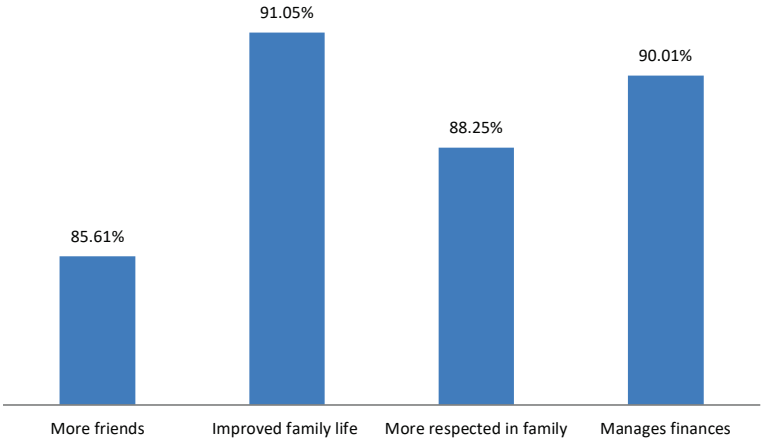
### Learners' perceptions of improved family life and friendships

The second theme *My family, my home* focussed on issues related to families as a social institution, specifically on gender equality and the empowerment of women and girls (SDG 5/MDG 3), the promotion of

health and wellbeing of family members (SDG 3/MDG 4, 5 and 6), and water and sanitation (SDG 6/MDG 7).

This theme focussed on building relationships with families and friends, and, as indicated in Figure 4, the literacy learners felt more respected in their families (88.25%), that their family lives had improved (91.05%) and that they had more friends (88.61%). Moreover, 90.01% of the learners indicated that they had an increased ability to manage family finances.

**Figure 4. Learners' perceptions of improved family life and friendships**




As indicated in Figure 4, 90.01% of learners indicated that they were better able to manage their finances, suggesting improved roles that (predominantly) women learners played in household resource management. These were noted in the educators' journals:

> *Learners bring family problems to class and want to discuss and solve them with each other.*

> *Learners can take better care of their family because of the learning.*

Learners' improved financial management abilities were captured in the following note made in an educator's journal:

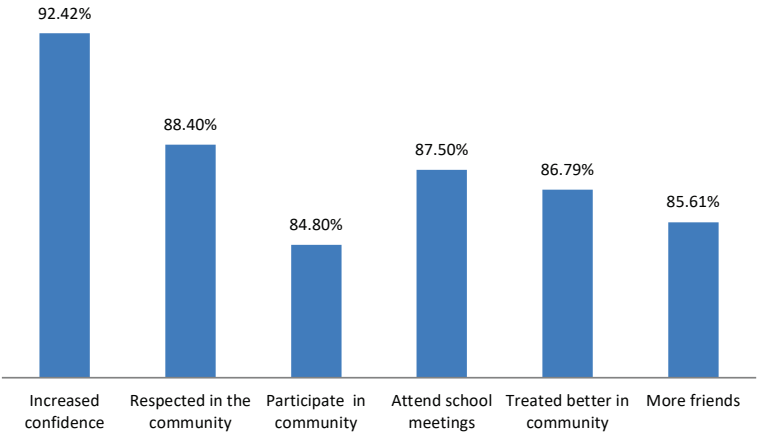
> *'Learners now know how to draw money at the post office and how to sign the forms at the post office'.*

The journals also showed that learners were able to interact with officialdom when having to complete official forms and applications for birth certificates, identity documents and social grants.

## Learners' perceptions of integration

The third theme *Living together* was considered pertinent in the context of post-apartheid South Africa. It focussed on the importance of community cohesion and settlements that were safe and resilient (SDG 11/MDG 7), peaceful and inclusive (SDG 16). This thematic section provided a foundational understanding of human rights and social justice to enable learners to access social services such as healthcare and social grants. It also encouraged learners to participate in community decision-making processes.

**Figure 5. Learners' perceptions of confidence and integration**




As indicated in Figure 5, 92.42% of the learners stated that they felt more confident at the end of the learning programme. It is noteworthy that, of the 24 indicators, self-confidence was ranked the highest. It was not surprising therefore that a high percentage of learners (88.40%) felt more 'respected by the community', 86.79% felt they were 'treated better in the community', and 85.61% of the learners indicated that they had expanded their social networks, which is an indicator that might contribute to increased confidence.

UNESCO (2016) in fact refers to the way in which the Kha Ri Gude Literacy Campaign fostered community cohesion and peaceful co-existence through its 'implementation model that created learners' groups that bring together people with common goals for themselves and their communities'. In addition, it refers specifically to the learners' expanded social networks, stating that 'besides the actual literacy learning experience, a lot of programme participants come for the social aspect. They meet new friends and the learning groups help to overcome loneliness … establish social groupings which cooperate in a range of socio-economic activities guided by reciprocity'. This view was corroborated in one of the educator's journals: 'Learners now see school as a social activity that has improved their way of living'.

The educators' journals refer to increased participation of learners in communal and specifically school matters:

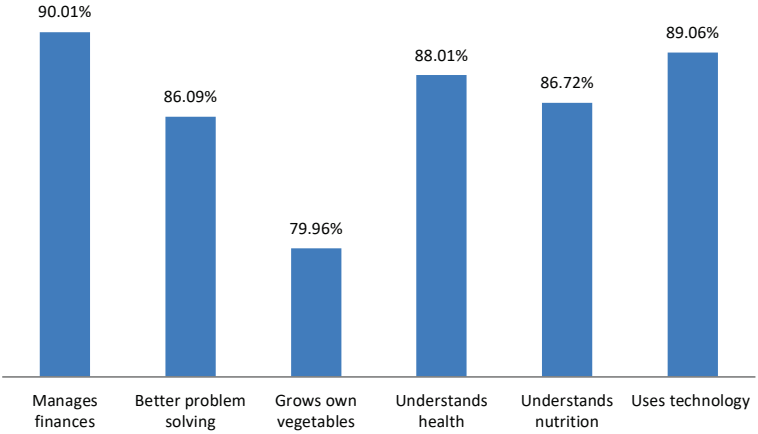
> *Learners are appointed as secretaries to projects. They assist children with homework and take minutes at meetings.*
>
> *They are able to sign without using their thumbprints. Mr X signed at a church meeting.*
>
> *Learners are appointed to committees. They can take minutes at meetings and can communicate with others in meetings.*
>
> *One mother was able to sign her name when she collected her child's report from school.*

Learners were empowered to even complain about their educator:

> *Learners complained about the teacher. She is always absent and she [needed to] be encouraged to improve her teaching methods.*

As Figure 6 shows, learners experienced improvements in managing their finances (90.01%) and dealing with everyday problems (86.09%), they were empowered to grow vegetables (lamentably only 79.96%) and to acquire improved knowledge of nutrition (86.72%) and health matters (88.01%). Moreover, learners cited their ability to use a cellphone or an ATM (89.06%), which enabled them to connect or transact beyond their immediate contexts.

**Figure 6. Learners' perceptions of the utility of newly acquired skills**




The educators' journals confirmed the learners' improved abilities by relating how they were able to rely on their improved mathematical and financial skills to establish small businesses that generated (survivalist) income, and how they could apply their technology skills in using mobile phones and ATM banking. While the impact of growing vegetables for health and nutrition was the lowest-scoring indicator, the educators' journals reported on a large number of home gardens and household food security initiatives (all requiring the skills taught in the campaign):

> *My learners have started a vegetable garden and their families get vegetables from the garden.*
>
> *They have formed a group for growing vegetables together and will take them home for their families and to sell.*

## Learners' perceptions of improved understanding of health issues

The theme of *Healthy living* focussed on health and wellbeing (SDG 3/MDG 6) and empowering women in relation to healthcare (SDG 5/MDG 3). Topics included were personal hygiene, health-seeking behaviour, filling in clinic forms, reading a child's immunisation and weight chart, understanding pregnancy, contraception, safe sex, sexual and reproductive health, and HIV and AIDS (SDG 5/MDG 5). There was a special insert on tuberculosis, which is often an opportunistic infection

occurring in people who have HIV and AIDS. In addition, the materials aimed to give information on nutrition, especially for children or family members who were immuno-compromised and receiving treatment for HIV. Educators were encouraged to invite staff from local clinics to address the learners on healthcare and to source additional health-related learning materials.

Given that approximately 70% of the learners were female, the materials dealt with sexual reproductive health in order to increase learners' knowledge on how to plan and space births. The same content broadened the knowledge base of men. While the educators' journals stated that male learners sometimes resisted learning this content, the fact that 88.01% of the learners indicated that they had improved knowledge of health issues showed that most learners (male and female) better understood health messages.

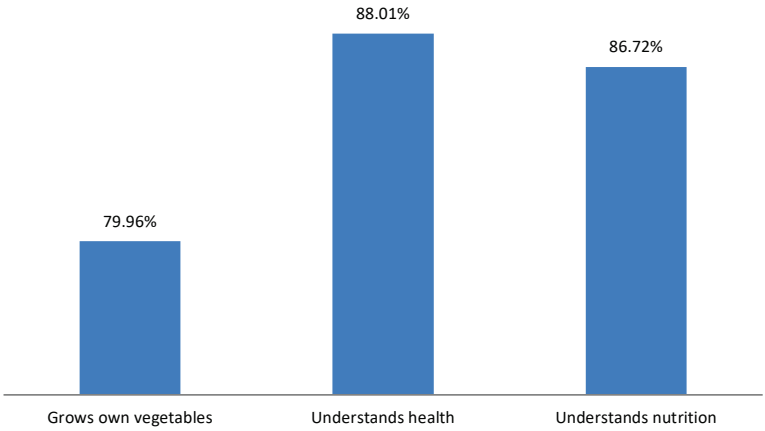
The theme also focussed on aspects of water literacy, including water usage, water purification and, given the high infant mortality rates, the mixing of rehydration formula.

The importance of the campaign's focus on child rearing and children's health was underscored by Osman (2009, p. 34) who pointed out that the classes she visited:

> *... comprised mostly older people with minimal prior education. Most of the female learners were secondary caregivers to children, some of whom were of school-going age or caring for orphans, and the knowledge of children's health and welfare was essential for women in their 'second round' of child rearing.*

Figure 7 shows learners' perceptions of the impact of learning on the relevant three health indicators.

**Figure 7. Learners' perceptions of improved understanding of health issues**




As shown in Figure 7, 88.01% of the learners stated they had an improved understanding of health issues. The educators' journals indicated this as follows:

> *This learning changes their lives because they know how to measure medicine. Learners with chronic illness are able to take their medication.*
>
> *Learners have received medical health for the first time, testing for diabetes and blood pressure. They are encouraged to clean their homes.*
>
> *Learners were supplied with reading glasses from the local clinic and they can now read the notice boards.*
>
> *They are now aware of TB and open the windows of the taxi and toilets for fresh air.*
>
> *Learners have improved their health support. Two learners received pills for diabetes and high blood pressure.*

Figure 7 also shows that 86.72% learners indicated that they had improved knowledge of nutrition. However, their improved knowledge of health and nutrition did not always translate into learners' growing

their own vegetables as a means to improve health and household food security.

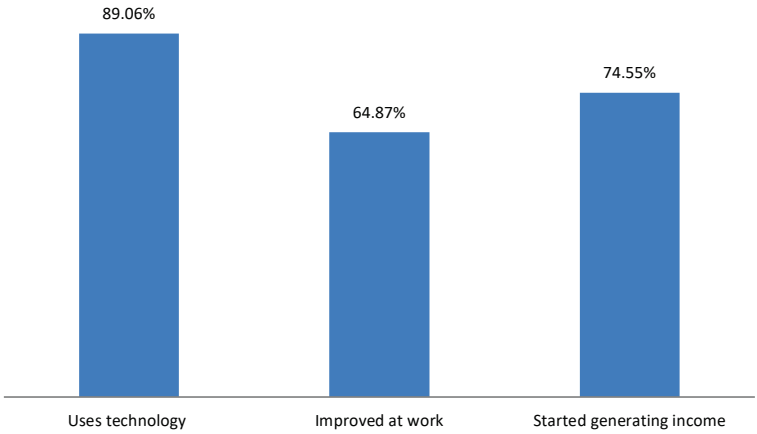
Notwithstanding the low number of learners reporting vegetable growing, the educators' journals included references to projects emanating from cooperation with agricultural NGOs that offered agricultural resources and technical skills. Such projects resulted in communal gardens and cooperatives that improved household food security and benefitted those most vulnerable to malnutrition (infants, young children and, given the prevalence of HIV, the immuno-compromised).

The educators reported that the food gardens played an important role in informal settlements and urban townships which are usually characterised by high population density and little agricultural space. Since most of the learners targeted by the literacy campaign subsisted on social grants, the introduction of the food garden concept promised many benefits, including enabling learners to sell surplus crops.

### Learners' perceptions of the impact of learning on income generation

The theme of *World of work* focussed specifically on issues of poverty and identified different survivalist-oriented business activities and productive employment opportunities, which resonated with SDGs 1, 7 and 8 and MDGs 1 and 7. It aimed to increase sustainable work opportunities and an awareness of decent work (SDG 8/MDG 1) by focussing on how to establish small businesses and make use of cooperatives. Recycling as a method of income generation was also described (SDG 12/MDG 7). Learners' perceptions about these issues are reflected in Figure 8.

**Figure 8. Learners' perceptions of the impact of learning on income generation**




Learners indicated that they were able to use technology (89.06%) to expand their communication or for banking. Although relatively low, the percentages of those who improved their positions at work (63.87%) and those who began to generate an income (74.55%) were promising, especially since the campaign lacked the capacity to teach various crafts and specific work-related skills.

Osman's (2009) statement that social and economic rationales are *inextricably intertwined* is pertinent here. The campaign recognised that literacy and numeracy skills are foundational skills and that developing them is a precursor of skills training; hence they are closely related to social rationale, which is a determiner of what is seen as 'economic' because of the following:

- There is a high correlation between literacy and GDP.
- Each year of schooling/learning contributes to increased income levels.
- Literacy has been linked with livelihoods and basic income generation.
- Basic literacy and numeracy are foundational competences for skills training.

- The literacy materials aimed to enable learners to better understand and manage their household budgets. This skill was expanded on by teaching learners how to set up entrepreneurial cooperatives.

UNESCO (2016) points out that, as a value-add to assist South African adults who had little or no schooling in acquiring literacy,

> *[t]he Kha Ri Gude Campaign enabled learners to acquire basic literacy skills including basic spoken English. This has enabled hitherto illiterate youth and adults to be more independent in conducting daily business including undertaking shopping errands and travelling. … In addition, program graduates have also been empowered to engage in more profitable income-generating activities or to improve the profitability of their existing projects. Essentially, therefore, the program enables both employees – most of whom had been unemployed – and learners to be self-reliant and to contribute toward their families' well-being and living standards.*

The same sentiments were expressed in the educators' journals, which indicated that learners were using their new technology skills.

> *Learners can use the ATM and also joined the library.*
>
> *He went to … [shop] with his calculator and counted his groceries.*
>
> *Many learners communicate with others using cellphones because of learning.*
>
> *As a group of educators, we teach learners the skills that we have for business.*
>
> *Learners are happy to be able to write. They even plan to open spaza [informal] shops because they can count, read and write.*
>
> *Learners are now able to participate in community projects like farming.*
>
> *Learners can now count the number of eggs laid each day.*
>
> *Learners [wanted] to be taught to sew. The supervisor had to explain the importance of learning to read and write first.*

*Learners have learned skills like beadwork … they make beads for hands, neck and headwear, and sew. They make things to sell.*

*Learners bake bread that they sell. I also taught them how to sew clothes to sell.*

*Learners help the community by moulding clay pots and sell them to the community.*

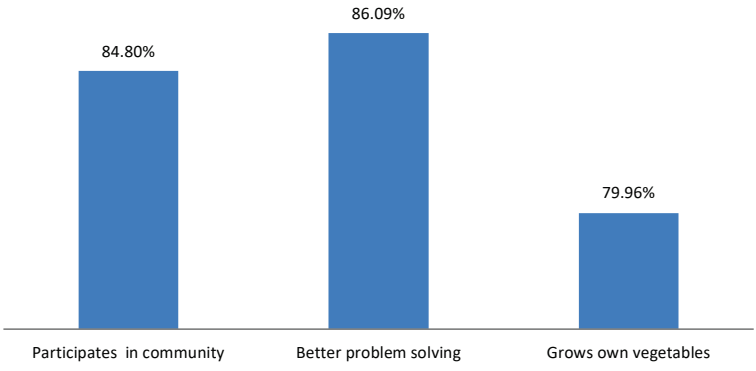
*They are planning on buying their own materials in order to use their shoe-making skills that I taught them.*

## Learners' perceptions of the impact of learning on sustaining the environment

This theme focussed on caring for *Mother Earth*. It dealt with exploring possibilities to end hunger by improving household food security and nutrition through sustainable agriculture (SDG 2/MDG 2). Lessons were designed to teach learners about water and sanitation (SDG 6/MDG 7), sustainable consumption, land production and conservation and water resources, topics that linked up with SDGs 6, 14 and 15/MDG 7 but were presented at a level accessible to foundational learners.

The materials encouraged the valuing and conservation of the eco-environment and biodiversity in learners' own communities by getting them to take transect walks to identify green areas, areas with animal life, areas suitable for greening and food growing, as well as areas that are possible sites for selling surplus produce. The perceptions of the learners in this regard are indicated in Figure 9.

**Figure 9. Learners' perceptions of the impact of learning on sustainability**



As shown in Figure 9, 84.80% of learners indicated that they participated more in community affairs, with 86.09% stating that they were better able to solve problems. Both of the aforementioned are foundational requisites for the sustainability of Mother Earth. In addition, the theme included lessons on recycling and re-using waste by, for instance, recycling cans and plastic bags to make handbags, trays, hats and mats. The educators' journals reported extensively on learner projects involving such recycling and also reported on learners' collecting glass, paper and plastic to sell to recycle merchants to generate an income.

The importance of vegetable growing mentioned by 79.96% of the learners has a broader impact, which was frequently referred to in the educators' journals. Assuming each learner provides additional food for a family of approximately four, one might argue that the programme that reached approximately 4.5 million literacy learners could impact on 16 million family members who might enjoy improved food security.

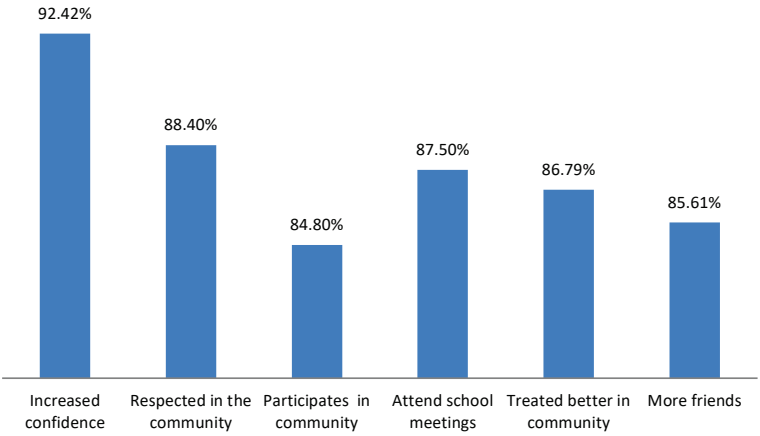
### Learners' perceptions of the impact of learning on social integration

The last two themes, namely *Our country* and *The world around us*, focussed on social integration, peace and cooperation at a local, national and global level (SDG 17/MDG 8). Roche (2018, p. 13) refers to the participatory role that literacy can play in bringing about peace and transformation in situations of protracted religious and cultural conflict. He highlights the importance of identifying spaces in education for critical dialogue on maintaining peace in conflict-affected societies. In the South African context, it was necessary for the campaign to prioritise addressing conflict arising from residual apartheid racial tensions and xenophobia arising from the high migration rates of foreign nationals from other African countries. This theme aimed to improve social integration in South Africa's multi-ethnic, multilingual and multicultural communities. These two themes endeavoured to promote safer human settlements (SDG 11/MDG 7) and the implementation of the ubuntu principles of peacefulness, care and inclusivity (SDG 10/MDG 1).

Not only the campaign materials but also the campaign's mode of implementation reinforced the message of promoting social cohesion and anti-xenophobia. The implementation of the campaign was such that it offered learning opportunities to learners from across the African

continent. Osman (2009, p. 34) notes that 'the programme was open to refugees and other foreign nationals living in these communities' and that the multicultural and multilingual classes promoted harmony. Additional curriculum approaches were used to heighten awareness of inequality in and among countries (SDG 10/MDG 1) and to encourage inclusiveness and mitigate discrimination on the grounds of race, class, gender, religion, ethnicity and other stereotypes. The learners' perceptions of the theme of social integration are displayed in Figure 10.

**Figure 10. Learners' perceptions of the impact of learning on social integration**




The educators' journals included many records that suggested that the learning materials enhanced learners' feelings of self-confidence (92.42%) and their being respected (88.40%) and better treated in communities (86.79%). Learning also increased their participation in the community (84.80%) and in school meetings (87.50%), and enabled them to expand their social networks (85.61%).

The educators' journals referred extensively to situations of intercultural harmonisation, increased communal support such as visiting sick neighbours and offering care, the establishment of sports and social clubs, and increased participation in community structures:

> *She cares for HIV patients by visiting them at their homes. She even takes them to hospital and she has phoned the ambulance.*

> *My class helped a learner whose house burned down and they gave her groceries and food.*
>
> *If one learner has a problem at home, they all help at his house.*
>
> *Learners are free to discuss their family problems in class and say how these affect them.*
>
> *Positive changes have taken place in the community. Last year two pensioners hung themselves. We told them that it is a year of prosperity because learning reduces stress.*

The following journal extract refers to the role of the educator in promoting social integration:

> *My class is a combination of whites and blacks. There were two groups, but we showed them the importance of group learning. It is easier to help each other and so that we were on the same level. They now work together.*

Indeed, as the following journal entry states:

> *They see school as a social activity and this has improved their way of living.*

## Conclusion

It is clear from the discussion in this article that the SDG/MDG-inspired materials of the Kha Ri Gude Adult Literacy Campaign had an impact on various aspects of learners' everyday lives. The learners' responses provided evidence that programme had contributed to increased political participation and participation in community activities, promoted values of ubuntu and inclusion, developed respect for cultural diversity, and facilitated a range of capabilities such as maintaining good health, raising healthy children and educating them. In addition, the literacy learning campaign developed an increased appetite for lifelong learning among both the adult literacy learners and their children. The findings confirm that literacy contributes to:

- self-esteem, confidence and perceptions of empowerment;
- political benefits that result in increased civic participation in community activities and local politics;

- cultural benefits that improve learners' ability to engage with their community and cross-national communities;
- social benefits, a better knowledge of healthcare and childcare and a higher chance of parents educating children; and
- economic benefits through improving chances of income generation.

To conclude, the literacy campaign has made a significant contribution to encouraging learning for development among nearly 4.7 million adults.

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# Achieving sustainable development goals through adult informal learning

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*This study identified informal economic activities in Hausa community in Ile-Ife, Nigeria. It examined how people acquire knowledge and skills about the identified informal economic activities and provided explanation on why people prefer informal economic activities to other types of economic activities to making a living in Hausa community in Ile-Ife, Nigeria. All these were with a view to providing information on how adult informal learning is being used as a means of achieving sustainable livelihood, and, consequently, the United Nations Sustainable Development Goal of ending poverty in all its forms everywhere. The study concluded that despite the fact that majority of the respondents do not possess the competencies required to participate in today's knowledge and technological driven labour markets, they are still able to use the knowledge and skills they acquired through informal means to take care of themselves and their families. In this way, informal learning becomes a means of livelihood, thereby contributing to eradicating poverty, one of the seventeen United Nations Sustainable Development Goals (SDGs).*

***Keywords:*** *sustainable livelihood, Sustainable Development Goals, informal learning, informal economic activities*

## Introduction

Poverty is a state of deprivation. Deprivation refers to lacking what is needed for wellbeing and its dimensions are physical, social, economic, political and psychological/spiritual (Chambers, 1995). The deprivation of poverty includes income (the lack of means to purchase basic goods and services); consumption (inadequate access to basic goods such as food and water); capability (insufficient knowledge, health or skills to fulfill normal livelihood functions); and living conditions (poor housing, unhealthy or dangerous environment, and bad social relations (Chambers, 2006; Food and Agricultural Organizations, 2006). Poverty can be explained from two perspectives, namely, absolute deprivation and relative deprivation (Wallace & Wallace cited in Indabawa & Mpofu, 2005). Absolute deprivation is based on the essentials of life, while relative deprivation is based on official poverty line that may be unrealistic for the community.

Food and Agricultural Organisation (2006) asserts that poverty is relative, multidimensional, complex and dynamic. The relativity of poverty means that poverty is contextually defined. That is, people are not poor in an absolute sense, but in relation to a particular socio-economic context. In other words, contexts create and define different shared expectations of what is needed for a decent life. More so, the meaning and relevance of key poverty indicators are not the same based on the availability and costs of public goods. Multidimensional nature of poverty means that deprivations are not only related to basic material resources, but also to social resources. Poverty as a complex and dynamic social phenomenon means that the conditions of poverty are interconnected, shared among people experiencing similar hardships and difficult to overcome.

In the literature, Indabawa and Mpofu (2005) identify a number of factors as contributory causes of poverty across different societies. These include lack of income and assets to secure basic necessities; lack of opportunities to participate in institutions of state and society

that make decisions about the lives of people, leading to powerlessness, vulnerability to conditions of shock and inability to cope with them; low productivity due to low capacity utilisation of existing industrial or manufacturing companies; unemployment, high population growth; adverse effect of globalisation; bad governance; corruption; negative attitudes of people towards innovative ways of generating income; debt burden; and unequal distribution of wealth.

Education has been recognised all over the world as an important tool for fighting the scourge of poverty. This is because returns on investment from education have been known to be very high. For example, Indabawa and Npofu (2005) opine that illiteracy enhances individual's capacity to contribute towards, and benefit from development. Njong (2010) explains that investment in education increases the skills and productivity of poor households thereby enhancing the wage level as well as the overall welfare of the population. Also, through education, marginalised people learn more about health and are better able to protect themselves and their children against diseases (Kulild, 2014).

The formal and non-formal forms of adult learning form the focus of governments, non-governmental organisations and religious institutions in addressing issues of poverty. De Grip (2015) suggests that there is a great emphasis on investment in formal education and training in the human capital literature. Otekhile and Matthew (2017) assert that the emphasis placed on the potential role of the informal sector in alleviating poverty and unemployment is a mere rhetorical consideration. The role of the informal learning sector in educational efforts has not been adequately recognised (Samlowski, 2011). More so, learning that takes place in settings and contexts, such as the market places, which were not designed to provide organised and structured learning interactions (Akinsooto, 2014; Akinsooto & Mejiuni, 2014) have not been given adequate recognition as ways and means of achieving sustainable livelihood. Whereas, the informal economy provides avenues for entrepreneurs to learn valuable lessons before going on to formalise their businesses, as well as employees to gain relevant skills that would be useful in the formal sector (Phillips Consulting, 2014). The neglect of the informal learning sector is a phenomenon that is not limited to developing countries as the European Commission focusses almost exclusively on vocational skills for employability, the labour market, and creation of jobs (Samlowski, 2011). How people acquire knowledge

and skills for effective participation in the informal economy and how these have in turn become means of livelihood have not been adequately investigated from lifelong learning perspectives.

Economic activities are actions that involve the production, distribution and consumption of goods and services at all levels within a society (Otekhile & Matthew, 2017). There are basically two sectors of the economy, formal and informal. The formal (modern or organised) sector, characterised by difficult entry, large-scale operation, regulated market and possession of formal education, covers the public sector and medium/large private sector enterprises that recruit labour on a permanent and regular basis for fixed rewards (Fapounda, 2012). The informal sector refers to all economic activities by workers and economic units that are – in law or in practice – not covered or insufficiently covered by formal arrangement (International Labour Organization (ILO), 2002). This means that informal economic activities are legal but are not registered and regulated by the government. Fapounda (2012) explains that informal sector is the part of an economy that is not taxed, monitored by any form of government, or included in any gross national product (GNP) and is the only way to earn a living for people who are self-employed outside the formal economy and not on anyone's payroll. Actors in the informal economy are often not recognised, registered or counted in national statistics (ILO, 2013). Informality of business organisation, use of rudimentary technology, lack of separation of consumption and production, ease of entry and exit, reliance on family labour and apprentices, low entry requirements in terms of capital and professional qualifications; small scale of operations; skills often acquired outside of formal education; and, labour-intensive methods of production and adapted technology are some of the identifying features of informal economy (Fapounda, 2012; Onyemaechi, 2013).

The informal economy is the world's largest employer of labour (Samlowski, 2011). It is made up of micro and small heterogeneous activities that generate employment up to 95% of the world of work (Walther, 2011). It exists in both developing and developed countries. However, the context of their environment, cultures and dynamics shape their evolution (Onokala & Banwo, 2015). In developing countries, some 60% of the potential working population earns their living in the informal sector (Fapounda, 2012).

In Nigeria, the informal sector accounts for 41.43% of the gross domestic product in 2015 (National Bureau of Statistics, 2016), while in 2017, the contribution of the informal sector is 65% of the country's gross domestic product (International Monetary Fund, 2017). In a survey report by Phillips Consulting (2014), 80% of the respondents believe that the informal economy is quite established in Nigeria, due to the country's high rate of unemployment. As a result, 73% of respondents approve of the informal economy due to its role in helping to solve this problem. The composition of the informal sector in Nigeria is basically of two categories: informal manufacturing and non-manufacturing activities (Onyemaechi, 2013). Examples of non-manufacturing informal activities are petty trading and personal services to informal construction, transport, money lending, manufacturing, and repairs. The dominant informal manufacturing activities in Nigeria are food, beverages and tobacco, textile and wearing apparel, wood and wood products, paper and paper products, chemical, petroleum, on-metallic mineral products, basic metal industries, fabricated metal products, machinery and equipment and home-based manufacturing (Central Bank of Nigeria, Federal Office of Statistics & the Nigerian Institute of Social and Economic Research, cited in Onyemaechi, 2013).

There are many studies on the informal sector in many countries across the world. The result of a study conducted by Othmane & Mama (2016) shows that the size of the informal sector in Morocco is 43% of the GDP in 2015. According to this study, three major factors were found to be the root cause: urbanisation, tax burden and corruption. Kassem's (2014) study shows that in Egypt, the informal sector accounts for 30.7% of the country's GDP in 1998 and rose to 40% in 2012. This increase presents a challenge to the country's economic growth and development. Kassem (2014) asserts that the causes of informality in Egypt are 'non-sufficiency of legislations and legal procedures to facilitate the establishment of formal enterprises, the declining role of the state in initiating new jobs, the increasing number of the unemployed, the increasing level of rural migration to urban areas and poverty'.

Desta (2018) reports that the size of the informal sector in Ethiopia significantly increased between 1996 and 2002. Although no empirical evidences were given for the increase, evidences from document analysis, literature review and personal observation were stated as the likely reasons for the increase. The reasons are excess supply of

unskilled labour from institutions, employment crisis which ensue due to privatisation programme and government policy which favours the pro-poor labour-intensive growth strategies.

According to the Ghana Statistical Services (2015), the results of the Integrated Business Establishment Survey indicate that about 60 per cent (59.9%) of employed persons are engaged in informal establishment. The results further reveals that out of the people employed in the informal establishment, a considerable number of them are unskilled. This fact is corroborated by Koto (2015), who asserts that '... the informal sector in Ghana is dominated mostly by people who have low levels of education, and hence, do not have otherwise employability skills. As a result, they engage in low-skill informal sector activities for survival'.

Moffat and Kapunda (2015) report shows that in recognition of the role of the informal sector, the government of Botswana spelt out the role of the informal sector in the country's National Development Plan 5 and 10. In Botswana, the number of informal businesses increased by 72.3% between 1999 and 2007 national informal sector surveys (Central Statistics Office, 2009). On the reason for joining the informal sector, the result of the survey carried out by Kapunda and Moffat (2010) shows that 40% of the respondents gave unemployment, 35% gave the need for self-employment and 25% gave the need for better income to supplement their monthly salary. This therefore shows that lack of education or skill is not the reason why people are joining the informal sector. Educated people are also joining the sector (Kapunda & Moffat, 2010)

Maiti and Sen (2010) explain that the size of the informal sector in India is extremely large without any sign of decreasing despite various economic reforms and huge economic growth that span several years. Lending support to this view, the Federation of Indian Chambers of Commerce and Industry (FICCI) and Konrad Adenauer Foundation (2017) assert that more than half of economic activity of India is carried out in the informal sector. Maiti and Sen (2010) allude that the informal sector in India is both a means of exploitation (where workers are underpaid, cannot express their grievances and work under poor conditions) and accumulation (where small business metamorphosed into large enterprises). According to FICCI and Konrad Adenauer

Foundation (2017), factors that account for the growth of the informal sector in India have to do with issues of business formalisation. These include high cost/fee paid during registration process, need for regular compliance and paperwork, harassment from officials, cumbersome registration process and more expenditure and liabilities.

Given the studies on the informal sector examined above, it is very clear that lack or low level of education or skill is not the reason for the growth of informality in five of the countries: Morocco, Egypt, Ethiopia, Botswana and India. It is only in Ghana that low level of education was given as reason why people participate in the informal sector. In addition, there is a dearth of empirical studies on how people acquire knowledge, skills and competence in the informal sector. This forms a major focus of this study. However, the literature reveals that low level of education accounts for the growth of the informal sector. For example, Singh (2009) asserts that low levels of formal schooling, high drop-out rates from school and lack of access to tertiary education are an attribute of people in the informal sector. As a result of this, these people resort to learning skills and competence through informal modes. Singh (2011) recognises that a great amount of non-formal and informal learning takes place in the informal sector. Hence, they form the major means through which people in most developing countries acquire knowledge, skills and competence. Sodhi and Wessels (2016) explain that in Kenya, people, mostly young low-income people in the informal sector acquire knowledge, skills and competence through 'unofficial fee-paying apprenticeships for themselves at the feet of older, often, illiterate craftsmen'. The reason for this is because they lack the skills and competence needed to function effectively in the informal sector.

The report of a consultancy by Global Consult (2012) on behalf of the Botswana Training Authority shows that majority of the people in the informal sector in Botswana had low levels of formal education and did not have any formal training relevant to the activities they were operating. The report further shows that 92% of the people did not have any formal training while less than 6% had attended vocational training. Also, the people acquire competencies (including indigenous skills) outside the formal system of education and training. The report by Global Consult (2012) does not support the findings of the survey by Kapunda and Moffat (2010). Therefore, there is the need for more studies on the informal sector in Botswana to really ascertain whether

or not low level of education is a major reason for participation in the informal sector.

The objectives of this paper therefore were to:

1. Identify informal economic activities in Hausa community in Ile-Ife
2. Examine how people acquire knowledge and skills about the identified informal economic activities
3. Explain why people prefer informal economic activities to other types of economic activities to making a living in Hausa community in Ile-Ife.

All these were with a view to explaining how adult informal learning is being used as a means of achieving sustainable livelihood, and, consequently, the United Nations Sustainable Development Goal of ending poverty in all its forms everywhere.

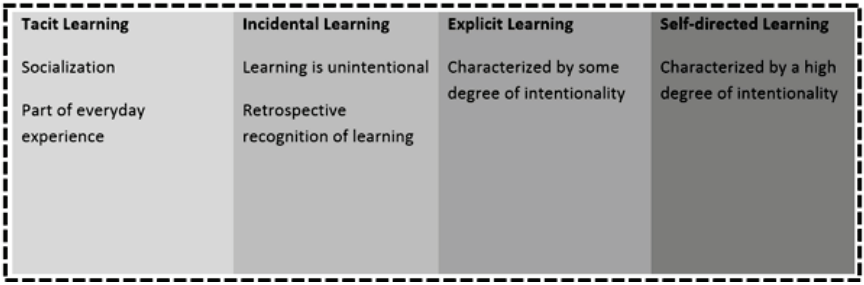
### *Conceptual framework*

This study is hinged on the conceptual framework of informal learning. Akinsooto & Mejiuni (2014) describes informal learning as:

> *Learning that takes place in settings that were not designed to provide organized and structured learning interactions, and by, and among individuals who would ordinarily not consider themselves to be facilitators of learning, and learners in such context. It occurs through conscious and unconscious attempts by individuals to understand their experiences and those of others and through informal relationships and structures.*

Informal learning is experiential, incidental and or unstructured, non-institutional learning (Mejiuni, Cranton & Taiwo, 2015). Mejiuni, Cranton and Taiwo (2015), identified four types of informal learning in the literature and explained that they occur on a continuum. Figure 1 shows the four identified types of informal learning occurring on a continuum. The continuum has been shaded to show the lightest, the most diffuse, almost unrecognisable form of informal learning (tacit learning), to the darkest, the most recognisable form of informal learning (self-directed learning), with no real dividing lines between them, because movement is possible, usually to the right, between the types. The continuum also showed that an individual can move from tacit learning of a subject matter to self-directed learning on the same subject matter.

**Figure 1: Forms of informal learning on a continuum**




*Source: Mejiuni, Cranton and Taiwo (2015, p. xxvi)*

Tacit learning is 'mostly experiential, unconscious, and unplanned learning acquired in everyday life in interactions with others and the environment' (Hrimech, 2005, cited in Mejiuni, Cranton and Taiwo, 2015), whereas incidental learning is learning which occurs during everyday interactions with some degree of the participation of the individual, usually unintentionally, in the process of knowledge construction. The individual becomes aware that learning has occurred during reflection upon incidents, practices and processes that s/he participated in or witnessed. Explicit learning involves deliberate acquisition of knowledge, skills and attitudes by person(s), but their degree of intentionality in this respect is low. Self–directed learning is learning in which learners exhibit a high degree of intentionality in the pursuit of learning (Mejiuni, Cranton & Taiwo, 2015). So while tacit and incidental learning are unintentional, explicit and self-directed learning are intentional forms of informal learning.

## Research method

The study adopted a descriptive case study research design. A case study research is an empirical inquiry that investigates a contemporary phenomenon within its real life context, especially when the boundaries between phenomenon and context are not clearly evident (Yin, 2003). This research design is relevant for this study because it provided an in-depth understanding of the phenomenon being studied in a real life context.

The population for the study comprised all adult males who were engaged in informal economic activities within Hausa community in Ife Central Local Government Area of Osun State. The Hausa are one of

the largest ethnic groups in Africa. In Nigeria, they are concentrated in the Northern part while some have moved to other parts of the country, such that today, they are found in almost all towns, cities and villages in the country. Wherever the Hausa move to, they usually live together and consequently form their own communities with unique social, economic and religious activities, different from their host communities. One of such communities is the Hausa community in Ile-Ife, Ife Central Local Government Area of Osun State. The sample for this study consisted of ten (10) adult males who are engaged in informal economic activities within the study area. Purposive and convenience sampling techniques were used to select one adult male chosen from each of the following informal economic activities: tailoring (mai dinke kaya), tea makers (mai shai), meat grillers (mai suya), shoemakers (mai dinke takalmin), clothes seller (mai tufafi), carpet sellers (mai carpet), beans seller (mai wanke), pitch weavers (mai guga), barber (wanzami), nail cutter (mai yanke kumba). Participant observation, which involves direct observation of phenomena in their natural settings and an interview guide were used to collect data for the study.

Observation was used to determine informal economic activities in the community, while the interview guide was used to obtain data directly from the participants in the research. Items on the interview guide were written in English and translated to Hausa by two research assistants who are proficient in speaking Hausa Language. This is because majority of the participants could only speak Hausa and the few who could speak English preferred Hausa. The two research assistants were trained by the researchers before going to the field to collect data. Data collected were recorded on tape, translated and transcribed. Data were analysed using qualitative content analysis.

## Findings

Table 1: Socio-demographic characteristics of interviewees

| Coding | Age (in years) | Sex | Marital Status | No. of wives | No. of children | Formal educational level |
|---|---|---|---|---|---|---|
| P1 | 25 | M | Single | None | None | Nil |
| P2 | 24 | M | Single | None | None | Secondary |
| P3 | 50 | M | Married | 2 | 10 | Nil |
| P4 | 45 | M | Married | 2 | 10 | Nil |
| P5 | 65 | M | Married | 4 | 13 | Nil |
| P6 | 52 | M | Married | 3 | 7 | Nil |
| P7 | 28 | M | Married | 1 | 2 | Nil |
| P8 | 35 | M | Married | 3 | 17 | Nil |
| P9 | 41 | M | Married | 2 | 3 | Nil |
| P10 | 25 | M | Single | None | None | Nil |

Source: Akinsooto and Akpomuje, Field work, 2017

Table 1 shows the categories of the participants, age, sex, marital status, the number of wives and children each of them has and their involvement in other informal economic activities. A total of ten (10) male adults who are involved in informal economic activities in Hausa community in Ile-Ife were interviewed. These ten (10) interviewees were within 24 and 65 years of age. Among the ten (10) interviewees, seven (7) of them are married while the remaining three (3) are not. The participants were coded as P1 (Participant 1) to P10 (Participant 10). Data obtained from the interviews conducted are presented below to answer the three research questions raised for this study. These are:

1. What are the informal economic activities in the Hausa community in Ile-Ife?
2. How do people acquire knowledge and skills about the identified informal economic activities to make a living in Hausa community?

3. Why do people prefer informal economic activities to other types of economic activities?

***What are the informal economic activities in the Hausa community in Ile-Ife?***

Informal economic activities are those legal economic activities that people do for livelihood but which are not taxed and regulated by the government and are not included in a country's Gross National Product and Gross Domestic Product. According to ILO (2002), informal economic activities are those activities by workers and economic units that are – in law or in practice – not covered or insufficiently covered by formal arrangements. The Hausa community in Ile-Ife has many informal livelihood opportunities. The informal economic activities observed during data collection amongst the Hausa settlers in Ile-Ife include shoe repairing (mai dinke takalmi), tea selling (mai shai), cloth selling (mai saida tufafi), barbing (wanzami), tailoring (mai dinke kaya), nail cutting, (mai yanka kumba), meat roasting (mai suya), pitcher making (mai saida guga), beans selling (mai wanke), and carpet selling (mai carpet). These activities are means of livelihood for members of these communities.

During the course of the interview, five (5) of the participants noted that they were involved in only one informal economic activity while the other five (5) participants said they were engaged in other informal economic activities which they learned through informal means.

***How do people acquire knowledge and skills about the identified informal economic activities to make a living in the Hausa community?***

Data collected revealed that observation, mentoring relationship and trial and error are the mode through which adult males in Hausa community in Ile-Ife acquired knowledge, skills and attitude about the informal economic activities they are involved in.

***Observation and mentoring relationship***

Observation is the process of watching someone or something. It involves keen noticing, viewing and having careful attention paid to details in order to acquire skills. Mentoring is a relationship between a less experienced individual; a mentee and a more experienced individual; a mentor which fosters personal development. Majority of the participants (90%) learned

these informal economic activities through observation and mentoring relationship. Below is some of what the participant said:

> *I learned how to sell cloth from my boss; I followed him around and learned how to measure clothes and how to identify quality clothes for 2 years. I am making enough to help me in my single life before I get married (P1).*

This participant was always going round with his boss both to buy and sell clothes. In this process, the participant acquired the knowledge and skill required for the trade. This is a form of informal mentoring which is an integral mode of informal learning. By following his boss round, this participant is able to master the art and skill of buying and selling clothes.

> *I acquired this trade (tea making and selling) when I saw the need to have a means of sustainable livelihood. I needed a trade since I saw my age mates being independent. I attached myself to a friend who acted as my boss and I learned it for two years (P2).*

Here, the participant learned how to make tea for commercial purpose while he was young by observing his friend for two years where he later established himself and has been into the work for 10 years.

> *I learnt this trade through observation for 2 years. Presently I have 3 people working under me, each one observes me for the first few weeks, and they first learn how to cut and shape tyres into different sizes which is called the tubing stage. After this, they start learning how to insert the thick needles into threads which is very important which is called the sewing stage, and also, they insert irons and handles into the opening in order to make it easy for people to hold and fetch. Also, there is the tying of long ropes (which of course we always buy from other people) at the tip of the handle so that it can be extended into wells (P4).*

The participant in this case learned by observing his boss at every stage involved in making pitcher that people use for fetching water from well. The relationship the participant had with his boss also enhanced the acquisition of knowledge and skill needed for the trade.

> *I started observing at the age of 5 till the age of 18. I learned the skills so well from my dad, from knowing the right equipment to use for different types of scalp, to knowing how to sharpen the*

> *instruments. Knowing how to maintain and steady one's hands is very important because it is a very tricky and dangerous craft; I have to be careful when handling each customer, holding their heads and necks carefully to avoid cutting them (P8).*

This participant learned barbing by observing his father for about 13 years after which he came to Ile-Ife and started the trade, which he uses to take care of himself and family.

> *Initially, it was a bit difficult to master the craft of slicing the meats into fine and smooth chunks, but later on, I started practising with papers, cutting papers into two. After I observed my boss for 2 years, I spent 6 months in learning how to slice meats alone which to me was the most difficult stage. After this, making of 'yaji' (pepper) for the meat was next, I started mixing pepper, seasoning, and salt and so on altogether. Finally, I learnt how to roast the meat and cut them into small chunks before I set up my own business here in Sabo, Ile-Ife (P9).*

#### *Trial and error*

This involves a process of finding a solution to a problem by trying many possible solutions and learning from mistakes until a way is found. P7 said:

> *I learned manicure and pedicure myself in Kebbi. I always go to 'Islamiyyah' (Arabic school). I saw someone making it for a living. I decided to know how to cut nails, both hands and legs. It intrigued me that people could pay for something that little. I started cutting my nails gradually, I cut myself a lot and I bled. After this, I would start again until I perfected my skills. After that, I came here (Ile-Ife). Now, I make between N600-N1, 500 per day. I have only one wife and two children and this is enough, I don't have any other work apart from this (P7).*

P7 saw people cutting nails for a living and he learnt it himself by starting with his own nails gradually. This was done in Kebbi State every time he went to Arabic school. After he had perfected cutting his own nails for one year, he took it as work to live on.

***Why do people prefer informal economic activities to other types of economic activities?***

When asked why participants preferred informal economic activities to other types of economic activities, the reasons they gave include, desire to make money at an early age and to be independent. Below are some of the responses from the participants:

> *I am a student of Biology/Computer Science in FCE Bichi, Kano. I have tasted both formal economic activities and informal activities. I have learned that these formal activities waste time and money. I have seen people wasting their time in school without having any vocation and when they finish, they still become unemployed. I don't want that to happen to me. I want to have a job to go back to when I leave school. All I need is to be different you know, an educated 'mai shai' which would mean I would be different among my peers (P2).*

P2 was a Biology/Computer Science student as at the time of conducting this interview at Federal College of Education, Bichi, Kano. According to him, going through formal education wastes time and money. The justification for this assertion is the rate of unemployment of university graduates and their inability to use the knowledge and skills they acquired for self-employment.

P1 said that:

> *I don't believe in going to school, I wanted to make money right from when I was 18 years and I felt going through the rigour of informal education is better. I joined my boss at an early age and I realised all I needed to make money is obtain a form and start following him to market where he buys and sells clothes. This, to me, is very interesting and the easiest way to make money. To me, that is the fastest route to becoming independent. I make at least between N7 000 and N8000 per day depending on customers wish and the quality of clothes.*

Here, the participant was of the opinion that going through formal education is stressful and time wasting. He preferred informal economic activities, which only took him two years of observing his boss to acquire

knowledge and skills of tailoring. This, to him, was the easiest route to make money and it paid off as he made at least N7000 – N8000 per day.

P8 said:

> *I started observing my father when I was young. He was a popular barber in Sokoto. Since he was popular and he had many wives, we were very comfortable. I started following him around and I started observing him since the age of 5 till the age of 18. I came to Ife and I started barbing as a trade. At least, I make N4000 per day. Now, I have three wives and 7 children and barbing is the work I am using to feed myself and my extended family.*

This participant saw that his father who didn't go through any formal training could comfortably take care of his family using the proceeds of his barbing trade. With this he didn't see any reason why he needed to go acquire formal education.

P10 said:

> *Let me just be honest, I don't find anything interesting in these formal educational activities. I wanted to start making money at an early age. I lost my parents very early and since I come from an extended family, nobody would fend for me. I felt the need to take care of myself and I went into tailoring which is the best craft to me. I love doing this and I don't see why I should combine it with other informal economic activities since I make up to N5000 per day.*

This participant, a tailor, didn't see anything satisfying in going through the rigorous stress of the long years of formal educational activities as that was a time waster and he preferred going along with the majority of his mates who learnt a trade at an early age and started making money that a graduate sometimes doesn't make.

## Discussion

Data collected through observation and interviews show that all the economic activities in Hausa community in Ile-Ife are informal. This informality does not make them illegal. They are legal economic activities that people get involved in that are not regulated by the government.

The result of this study shows that observation, mentoring relationships, trial and error are the modes through which people in Hausa community acquire knowledge and skills about the specific informal economic activities they engage in. While data were being collected, it was observed that younger adults or apprentices stood beside and/or around main traders or master craftspersons, observing how the trades/activities were being done. The 'apprentices' were learning from the main traders or master craftspersons by running errands, watching (observing) how customers/clients were being attended to, and giving tasks to do. This result is in line with Akinsooto and Mejiuni's (2014) study on the dynamics of informal learning in two local markets in Ile-Ife, Southwest Nigeria that shows observation and trial and error as parts of the modes through which buyers and sellers learn from one another, as they interact in order to derive value for money and maximise profit respectively.

The knowledge and skills acquired through informal modes are life skills. According to Samlowski (2011), life skills are basic skills that are not transmitted through formal schooling but which enable people to feed their families, to keep healthy and to protect themselves. The possibility that this presents is to widen access to education as a form of social justice (Oduaran, 2006) for persons involved in informal economic activities. This would be through adult education programmes, specifically non-formal educational programmes on key areas such as how to get small loans to finance small businesses, savings and investment opportunities, dealing with and avoiding trade-related hazards, health tips, developing branding and marketing skills, and even basic literacy. These programmes could be face-to-face, radio or through the use of ICTs as noted by Mejiuni and Obilade (2006).

From the data presented above, the participants were of the opinion that learning through formal means wastes time and so they avail themselves of the opportunities that informal learning presents. As observed during the period of data collection, majority of the young Hausa men and women who should be in school (formal educational institutions) during school hours were attending to customers/clients at their different trade points. This observation buttressed the participants' view about their preference informal activities. The reason for this is because entering the informal learning sector is not as rigid as the formal educational system.

Majority of the participants as shown in Table 1 do not possess formal education. Their lack of formal education was evident from observation that they could not communicate in Standard English. Hence, they do not have the competence required in today's labour markets that are knowledge and technology driven. This gap can be filled through non-formal educational programmes that are organised in the form of outreach to disadvantaged groups and communities (Preece, 2006; Bhola, 2006; Adekanmbi, Aderinoye & Sarumi, 2006). The formal educational system is hierarchical, has stipulated entry requirements, organised curriculum, fixed duration, requirements for graduation which individuals must fulfil for certification or to be judged as competent for the labour force. The informal economy has significant job and income generation potential because of the relative ease of entry and low requirements for education, skills, technology and capital (International Labour Organization, 2002). Non-formal educational programmes can be used to make up for formal education, and can complement the informal learning opportunities that are available to Hausa traders who are involved in informal economic activities the study area.

The need for survival is another reason the participants gave for their involvement in informal economic activities. For example, P 10 asserts: '… I lost my parents very early and since I come from an extended family, nobody would fend for me. I felt the need to take care of myself …' It was observed during the period of data collection that many of the Hausa traders in the Sabo (community where Hausa settlers stay in any city in Nigeria) area of the town are young persons who seem to be fending for themselves and other dependants. Akinsooto and Mejiuni (2014) in their study identify the need for survival as a factor that makes buyers and sellers in market places learn as they interact with one another in market places. In Maslow's theory of motivation, the first concern of every individual is the satisfaction of the physiological needs, which are the basic human needs required for sustenance.

This finding corroborates ILO's (2002; 2013) assertion that poverty as a major cause of informality is occasioned by lack of education (primary and secondary) to function effectively in the formal economy, lack of recognition of skills garnered in informal economy and lack of livelihood opportunities in rural areas which drive migrants into informal activities in urban areas or other countries.

In conclusion, there are many informal economic activities in the Hausa community in Ile-Ife. Knowledge and skills about these activities are acquired through observation, mentoring relationships and trial and error. The motivations for engaging in informal economic activities are the view that formal education wastes time, occasioned by its hierarchical nature, which prevented majority of the participants from taking advantage of formal educational opportunities, and the need for survival. Despite the fact the majority of the respondents do not possess the competencies required to participate in today's knowledge and technological driven labour markets, they are still able to use the knowledge and skills they acquired through informal means to take care of themselves and their families. These informal means can be enhanced and complemented through non-formal educational programmes. In this way, informal learning becomes a means of livelihood, thereby contributing to eradicating poverty, one of the seventeen United Nations Sustainable Development Goals (SDGs).

The four types of informal learning identified by Mejiuni, Cranton and Taiwo (2015): tacit, incidental, explicit and self-directed could be seen in how the participants in this study acquired the knowledge, skills and competence they use in the respective economic activities they engaged in. Explicit and self-directed learning, which are intentional forms of informal learning are more prominent than the others; tacit and incidental, which are the unintentional forms of informal learning. The degree of intentionality in the process of acquiring knowledge, skills and competence and awareness that learning has taken place among the participants are very high.

## Recommendations

Based on the findings of this study, the following recommendations were made:

1. The informal economy sector should be recognised as an important context with enormous potential for adult education and lifelong learning.
2. Provision of adult education and lifelong learning programmes should target actors in the informal economy.
3. Delivery of adult education and lifelong learning programmes should assume informal dimension.

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# Learning across the lifespan: Lifelong learning in Neighbourhood Houses in Australia

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*Neighbourhood Houses in Australia are spaces of education and learning that cater to and work with adult learners across a lifespan. They are known as fourth sector education providers in the Adult and Community Education (ACE) sector. With a history spanning nearly 45 years, Neighbourhood Houses provide vital education opportunities for adult learners. The research is set against the backdrop of the current project of lifelong learning, which has dominated adult education discourses for more than 30 years. Neighbourhood Houses are learning organisations and sites of social inclusion that embody adult learning practices. This empirical research of learners' experiences in Neighbourhood Houses reveals the complex and varying reasons for participating in ACE that are beyond the realms of formal adult education and include reasons such as decreasing social isolation, fostering friendships and new networks, increased wellbeing, raising income capacity and further learning to improve employment prospects. In doing this, we provide three case studies*

*from the larger data sample of this study to give insight into the complexity of adult education and learners' experiences that occur in this dynamic space of learning. The outcomes for participants vary but include greater mastery of English language, improved foundational literacy, numeracy and computer skills, increased understanding of civics and citizenship and Australian history culture and society, while reconstructing previously held negative views of themselves as learners.*

## Introduction

Neighbourhood Houses opened in Victoria in the 1970s to provide spaces for accessible adult education and to alleviate women's social isolation (Foley, 1993). They are generally small–medium sized organizations, community-managed, not-for-profit education sites offering formal and informal adult education programs in local and supportive environments (Rooney, 2011). They integrate adult education and community development approaches highlighting multi-layered connections between learning, social engagement and personal and social change (Kimberley, 1998). There are more than 400 Neighbourhood Houses in Victoria, 207 receive funding to deliver pre-accredited preparatory adult education programs, and 55 are registered training organisations delivering nationally recognised qualifications (NHVIC, 2016).

Neighbourhood Houses have played an increasingly important role in transition education since they were established. They feature small classes, a welcoming and flexible learning environment, community support and networking opportunities. The houses deliver education programs to a broad range of participants such as: 'second-chance' learners who may have had previously unsuccessful experiences in formal education institutions; 'new directions' learners who are looking to develop new skills or improve existing skill sets; and later life learners who are attending the houses to learn a new skill, craft and to socialise with others (Ollis, Starr, Ryan, Angwin & Harrison, 2016). The programs are inclusive of people typically under-represented in formal educational settings: the socially, economically, culturally marginalised and those living with a disability (Ollis et al, 2016; Thompson 2015; Townsend, 2009).

Neighbourhood Houses are well positioned to meet rising expectations

about learning across the lifespan for diverse communities, catering for participants of a range of ages, life experiences, ability groups and backgrounds, and reflect significant population changes. With the increasing ageing of populations, and the interest in healthy ageing, there is a growing interest in lifelong learning. Approximately 80% of Neighbourhood Houses in Victoria provide programs determined by older adults (NHVic 2017). The age-range of participants in Neighbourhood Houses is broad, with those in the 55–64 and 65–79 age-groups occurring at higher levels than the population. Learners from culturally and linguistically diverse (CALD) backgrounds comprise 42% of pre-accredited learners in language programs, employment training programs and foundation courses (Deloitte, 2017). Approximately 74% of participants in Neighbourhood Houses are women (Savage & Perry, 2014).

Adult learning typically includes formal and informal learning based on holistic and lifelong approaches encompassing the whole lifespan to empower and support individual participants and local communities (Golding, Kimberley, Foley & Brown, 2008; Humpage, 2005; Ife, 2016; Kenny, 2006; Rooney, 2011; Thompson, 2015; Townsend, 2009). Formal learning in Neighbourhood Houses supports the national agendas on skills and workforce development in response to changes in industrial, demographic and technological circumstances (Bowman & McKenna, 2016; SA Centre for Economic Studies, 2013), while building the knowledge, understanding, skills and values essential for an educated and just society. Neighbourhood Houses are part of the Adult Community Education (ACE) system sometimes defined as the fourth sector of education in Australia. Federal and State Governments acknowledge its contribution and provision of educational opportunities for second-chance learners (Karmel & Woods, 2008). The Statement on ACE by the Ministerial Council for Vocational Education and Training (2008) recognised that the ACE sector is an important provider of pathways into further education and training for disadvantaged learners. In this education space, the focus is on pre-accredited training, general education skills such as literacy and numeracy, recreational, leisure and arts-based programs. A study by Deloitte Access Economics (2017) on outcomes for learners in pre-accredited courses in Victoria found that significant numbers of learners undertake further education, transition to accredited training, and achieve an accredited qualification

(p. 2). As mentioned previously, some houses are registered training organisations providing accredited training in fields such as community services and welfare work, aged care, hospitality, childcare, youth and disability services.

This article analyses the role of Neighbourhood Houses in terms of learning across the lifespan, referred to most recently as 'lifelong learning'. Specifically, we focus on the case studies of three learners and their motivations and aspirations regarding their education. We outline the learners' motivations for attending the Neighbourhood Houses, the education programs the learners are engaged in and the outcomes associated with this learning in terms of further study, work, social inclusion and wellbeing. Lifelong learning is discussed in more detail below, along with a description of this case study research.

## Lifelong learning

There is much debate about lifelong learning – its meaning, its purpose, how it has become common discourse in adult education and continuing education, and how it has impacted notions of education and learning more broadly (Biesta, 2013; Edwards & Usher 2001). Most developed countries have some form of lifelong learning policy that positions learning beyond the traditional years of early childhood, primary and secondary education to learning which embraces and encourages its citizens to continue to learn both formally and informally across a lifetime. In 1996, the OECD education ministers declared 'lifelong learning for all' a policy priority (Watson, 2004), emphasising lifelong learning as 'human capital' in order to secure greater productivity and economic growth (Biesta, 2013, p. 65). In addition, the Delors report for UNESCO, *Learning: The treasure within*, recognised the importance of lifelong learning and its impact on social cohesion in an era of rapid social, economic and political change (Watson, 2004). UNESCO believes education transforms lives and is central to its mission to eradicate poverty, drive sustainable development and build peace (UNESCO, 2018). UNESCO's sustainable development goal, has seven outcome targets, three of which resonate with, and are relevant to, this research.

They are:

- 4.3 Equal access to technical and vocational education and higher education
- 4.4 Relevant skills for decent work
- 4.5 Gender equality and inclusion

While lifelong learning is not a new concept, it has been co-opted by neoliberal, global and market-driven agendas focussing on international economic competitiveness, with Biesta (2013) claiming that the lifelong learning promise of the Delores report has been subsumed by economistic and neoliberal agendas related to the development of human capital, competitiveness and economic growth. In such a context, lifelong learning and learning generally becomes a commodity, and a means by which individuals, communities and nations adapt and respond to the rapid social, economic and technological changes of the twenty-first century (Edwards & Usher 2001). As Illeris (2007) claims:

> *Apart from the individual level, learning has also been grounded to a wide extent on a social and societal level reaching right from the nature of individual learning situation to comprehensive reforms and structures of societal learning-related to demands and services. (p.2)*

The discourses of lifelong education and lifelong learning are often used interchangeably, with limited differentiation between the two to uncover the changes that learners make in terms of knowledge, aspirations, skills and attitudes, across a learner's life span (Findsen & Formosa, 2011). Edwards and Usher (2007, p. 2) describe learning as a 'socio-culturally embedded set of practices' with lifelong learning being relational, embedded in and generated by social engagement and interaction. It involves 'active knowledge formation' rather than passive acquisition of knowledge and can occur in a multiplicity of settings, sites, spaces and activities representing a lack of boundaries or borders (Edwards & Usher, 2001).

Zhao and Biesta (2012) identify key concepts within the current scope of lifelong learning: 'relationships', 'identity, and the self' (p. 333), and argue that these have gained greater relevance as a reaction to a dynamic global, social and economic climate and policy initiatives

designed to drive and compel flexible responses to 'socioeconomic' and 'sociocultural' change. Edwards (1997) and Edwards, Nicoll & Lee (2002) refer to the imposition of forms of learning to allow people to maintain 'flexible identity' and 'flexible subjectivity' (p. 333). Edwards and Usher (2001), however, caution against 'universal and totalizing' (p. 285) descriptions of lifelong learning that limit its potential and the possible outcomes of its endeavours and activities. This is especially important for second chance learners' positional and transformative motivations and outcomes. An aside, and a potentially significant aside, is the omission of gender in the literature and discourse of lifelong learning (Rogers, 2006). This is perhaps a surprising realisation and one that is not so much deliberate as unconscious. One argument for this omission is a consequence of individualism (neoliberalism and managerialism), which avoids constructs of gender, with its focus on 'Rational Economic Man' (*sic*) or REM (see, for example, Butler, 1983). Rogers (2006) argues that gender is significant in reconfiguring identity. Another argument might also be a belief that gender issues have been repaired and therefore indicative of a broader trend.

Illeris (2007) claims there are three dimensions to any form of learning – the cognitive, emotional and social dimensions. For us, the notion of adult education represents participation in learning, social engagement in society and community, engendering independent thought and self-efficacy. This is confirmed in the data from our research which affirms the holistic and embodied dimensions to adult learning in Neighbourhood Houses. Jarvis presents us with a holistic and embodied view of learning:

> *[t]he combination of processes throughout a lifetime whereby the whole person – body (genetic, physical and biological) and mind (knowledge, skills, attitudes, values, emotions, meaning, beliefs and senses) – experiences social situations, the content which is then transformed cognitively, emotively or practically (or through any combination) and integrated into the individual person's biography resulting in a continually changing or more experienced person (Jarvis, 2010 p. 39).*

In Neighbourhood Houses adult learning programs focus on building knowledge, skills and abilities through formal classroom learning, such as preaccredited and accredited courses and training; through *informal*

*learning programs* including personal interest learning and incidental learning, which is embedded in the everyday social interaction with other learners, teachers and staff thereby capturing all three learning dimensions.

Lifelong learning policy in Australia has had a fraught history and limited success. While it has been adopted in policy discourses by some organisations (organisational learning) and spheres of local government, it is presently not enshrined in government policy. Currently, Adult Learning Australia (ALA), the national peak body for adult learning in Australia has called for 2018 to be recognised as the year of lifelong learning (ALA, 2018). ALA is advocating for lifelong learning to be enshrined in Australian education policy, ensuring that education and learning are recognised across all four sectors of education, from early childhood, primary and secondary schooling, further education and learning in later life. This will prepare the Australian workforce well for the advances and changes in technology and for the skills and knowledge(s) needed for Australia to be flexible and nimble in a rapidly changing global world of work. However, Watson (2004) notes three areas of education policy that currently impact on and impede policy progress of lifelong learning: the dominance of the formal education sectors; Commonwealth and State financial relations and managerialism, and education performance measurement.

## Research methodology and methods

This qualitative research examining the learning experiences of adult learners in education programs in Neighbourhood Houses was conducted in two phases during 2015 and 2016. The research was initially developed following a request from the Barwon Network of Neighbourhood Centres in response to significant economic and employment restructuring in the Greater Geelong region. The first phase was conducted in collaboration with Neighbourhood House networks in the Barwon and, later, the South West regions of Victoria. The second phase, conducted with several networks across Victoria, was in collaboration with Neighbourhood Houses Victoria. The broad aim of the research centred on second chance learners and their transitions to employment and higher education such as TAFE and university.

## Research aim

The research aimed to investigate social, education and employment outcomes for adult learners who participate in formal and informal education programs in Neighbourhood Houses.

Research questions

1. Who are the participants in the Neighbourhood House education programs?
2. What are their motivations for participation in education?
3. Have the adult education programs provided a pathway for learners to further higher education and training?
4. How do the education and recreation programs assist to alleviate learners' social isolation, and contribute to their health and wellbeing?
5. How has participation in the formal and informal education programs, contributed to a change in identity formation of these adult learners and their self-identification as successful learners?
6. In what ways have the education and social programs contributed to adult learners' options for seeking new employment?

During the data collection in the first phase of the research, we identified a group of older adult learners, who were participating in the houses for a range of reasons. We refer to them as 'later life learners'. The second phase of the research in 2016 focussed on data collection across the entire state of Victoria and included both groups of learners (second chance and later life). It also included interviews with a cohort of coordinators (managers) of Neighbourhood Houses.

## Case study research

This qualitative research focusses on the learning and education experiences of adult learners in Neighbourhood Houses in Victoria (Stake, 2006). The methodology of case study is used to provide in-depth understanding of the participants' experiences of learning in Neighbourhood Houses. Case study research is heuristic, it provides rich descriptions of their learning experiences. This is important because

some of the participants in Neighbourhood Houses have had complex experiences of education and we wanted to present their stories in a way that was sensitive and able to provide a nuanced understanding of this complexity of these experiences (Merriam, 1998). Those interviewed for this research participated in an in-depth interview, participants were given their transcriptions to check, adapt and change if necessary. The in-depth interviews provided the data used for the case studies.

## Poetic representation of case study data

We draw on the literary device of poetry to work in conjunction with the case studies. Informed by the epistemology of phenomenology, we layer the experiences of the people we interviewed, their lives, expressions, learning experiences, desires, ambitions, meaning, truth(s) to text. What follows is a rich expression of the case data in the form of poems. We draw on Laurel Richardson's (1993) work in this area. She asserts:

> *Poetic representations are a preferable way to tell some sociological ways of knowing. Interactionists theorise that a person's thoughts are always in deferral when they are speaking. Nothing is simply present or absent but ideas in transformation; 'facts are interpretations after the fact'. Self-knowledge is reflexive knowledge poetic representations reveal the process of self-construction, deferrals and transformation, the reflexive basis of self-knowledge, the inconsistencies and contradictions of a life spoken as a meaningful whole. (1993, p. 704)*

The presentation of the stories as case studies and in poetry follows Sara Lawrence-Lightfoot's portraiture methodology where she encourages researchers to use both science and art to capture the complexities and subtleties in human life (Ryan, 2016). Using case studies and poetry in this article we begin to understand the human experience of learners, their motivations, desires and their agentic reasons for being there.

## Data sample and participant selection

The research project received ethics approval from Deakin University, Faculty of Arts & Education. Participants from across Victoria were accessed through our research partners – the Barwon Network of Neighbourhood Houses, the South West Network of Neighbourhood

Houses and Neighbourhood Houses Victoria. The research was promoted in the network's newsletters and other advertising material. 'Purposive sampling' was also used to select participants, on the basis of recommendations from Neighbourhood House coordinators to ensure a broad representation of prior experiences (Merriam, 1998).

A total of 87 semi-structured interviews were conducted with learners and managers (Stake, 2006).

- Phase 1 – 42 interviews with learners in Neighbourhood Houses in the Barwon and South-West regions of Victoria
- Phase 2 – 45 interviews with learners and nine interviews with Neighbourhood House managers across Victoria.

The research participants were given their interview transcriptions to review, adapt and change, if necessary. All participants were given a pseudonym in order to maintain their confidentiality, and other identifying information has been changed. The transcripts were analysed using category construction, which involves the construction of categories of data focussed on interpreting recurring patterns or themes (Merriam, 1998). A software program (NVIVO) was used to 'chunk' the data, so that common themes or patterns were exposed.

## Case studies of learners in Neighbourhood Houses

This paper presents three case studies with data presented as poetry, but we also draw generally on the broad themes that are central to the findings in this research. These include the habitus of Neighbourhood Houses and the educative and learner practices within the houses; the relationships that are formed between learners, learners and tutors, and learners and Neighbourhood House staff; adult learning reconstructing previous negative education and learning experiences for second chance learners; and the social, informal and incidental learning in Neighbourhood Houses.

The participants chosen for this article are Peter, Lesley and Sally (pseudonyms), all with different motivations, learning needs and outcomes. Their stories reveal a diversity of lived and learning experiences which are indicative of the range to be found in the data. Peter was a second chance learner and he came to study to further his employment prospects. Lesley came to the Neighbourhood House in

response to a recommendation from her job services provider. Sally was a later life learner who came to learn English.

### Lesley: Becoming a confident and social learner

Lesley came to the Neighbourhood House to undertake voluntary work to satisfy New Start requirements (New Start is an Australian Government income support payment made to people who are unemployed and looking for work). Her earlier learning experiences were not successful – she explained she was too easily distracted and lacked concentration. Lesley left school after completing Year 8 and worked in various jobs before her two daughters were born.

> *I completed Year 8.*
>
> *When younger, before kids – retail, milk bars and take-away food.*
>
> *I didn't really last too long because*
>
> *I didn't know what I was doing*
>
> *I didn't exactly get the experience that I needed,*
>
> *not the experience that I have now.*

At the Neighbourhood House, Lesley volunteered in the community café and has undertaken several accredited units in hospitality, tailored to her role in the café. Along with learning the basic skills required for working in the café, such as food handling and coffee making, she has learned to undertake daily cash balances and meal preparation, which has allowed her to take on greater responsibility. As well as the enjoyment she experienced learning new skills, her daughters appreciated and took great delight in her newly acquired cooking skills.

> *I've learnt a lot*
>
> *since I've been here*
>
> *such as working with customers.*
>
> *I wasn't much of a cook when I started.*

*Now I do desserts*

*I do lots of different meals, things that I never thought I would be doing.*

*I've learnt how to make the coffees.*

*My main purpose was to get the experience*

*so I could get out and get a job.*

*But it's helped me at home.*

*Now I could virtually cook anything.*

*It's a big achievement.*

*I've got Certificates for Food Handling and Coffee Making.*

*It sort of entails the money handling of the café –*

*food prep, cleaning the coffee machine,*

*packing that up.*

Over time, Lesley has become a confident and successful learner. Along with completing units in hospitality, she has enrolled in an accredited General Education for Adults program at TAFE where she is learning computing and mathematics. She has advanced to Level 2 mathematics and is studying Level 1 computing. She had no previous experience using a computer. She did not know how to turn on a computer and she could not have previously contemplated learning about computers. Lesley was keen, however, to return to paid employment, and thought that having left school at Year 8 it was important to gain further skills to help her find and secure paid work.

*I'm doing a course at TAFE.*

*It's just the adult education*

*computers and maths.*

*I'm nearly finished doing the maths,*

*I'm doing well in the computers as well.*

*With maths, I didn't know anything*

*Now I have the confidence to sit there and concentrate and block things out when I*

*need to.*

*I'm a lot more focussed.*

*Things would distract me very easily*

*now I can actually be here and concentrate on what I'm actually doing …*

*I've got the confidence and everything else to do that*

*which I find good because beforehand*

*I was a scared little chicken.*

Lesley enjoyed the opportunity provided at the Neighbourhood House to work with others, and to form friendships, and she became more confident socialising and talking to others. In the community café, she has learned how to work as part of a team, which she had not been familiar with in her past working experiences, and she has enjoyed the support the volunteers offer one another.

*I'd never worked with others,*

*so coming here and working with other people*

*helps you be a part of a group*

*instead of just being a single person.*

*Being a part of a group is a bonus,*

*you form friendships.*

*I think it's the fact of helping everyone out*

*and finding out new things as a team.*

*Positivity of others,*

*they encourage you to do*

*different things I would never have done*

*at the start.*

Lesley's ability to comfortably interact and communicate with others has resulted in her feeling much happier, and it was a significant change in her life. As a shy young girl, and as an adult, she found socialising with others or participating in activities difficult to do. She attributes her increased confidence and ability to be more outgoing to the positive and supportive environment of the Neighbourhood House where she was encouraged to try new things.

*I've been here for about four and a half years*

*I'm a totally different person.*

*I had no confidence at all when I started*

*now I've learnt and grown.*

*Before I started here I was like a scared little kid,*

*I wouldn't speak to anybody, wouldn't involve myself in activities*

*or things like that.*

*I was so shy and withdrawn,*

*since I've been here I'm more outgoing,*

*once you get me talking*

*I won't shush.*

*It's just been a big confidence booster here*

*it shows at home as well,*

*I'm a lot happier.*

Lesley was interviewed on her last day of volunteering in the community café. The skills and confidence she has gained at the Neighbourhood House resulted in her feeling that she was work-ready.

*I'm hoping after I finish this course I'm ready for the workforce.*

*I'm actually ready now*

*the sooner I get a job the better.*

*The same as what I'm doing now – café work.*

*I think there might be one more course to do*

*the RSA [responsible serving of alcohol]*

*a lot of coffee shops involve themselves now with alcohol.*

### Peter: Learning new skills for employment

Peter is 22 years of age and moved to the Greater Geelong area two years ago. He completed school at the end of Year 11 and for the next three years worked in retail, reception and bar-tending. He had no formal qualifications in hospitality or retail but learned skills on the job. When he moved to the area he left his work and enrolled with Centrelink. In order to receive benefits, he was required to attend the Neighbourhood House, which he really liked, and he enrolled in a Certificate III in Aged Care. During this time, he volunteered in administration and followed up with a further qualification that included an internship. When the course finished he successfully applied for a 12-month traineeship in a local health service and is now studying Certificate III in Business. He enjoyed learning at the Neighbourhood House and made good

friends with other students. Studying has taught him that you need to work hard to get where you want to be, and that it is important to give people chances. For the future he would like to help people, possibly in community services or youth justice.

*I did all the way up to Year 11 and decided to move.*

*I'd just finished a job.*

*I was a bit lost and that led to some depression.*

*I did admin and reception work before*

*when I did it*

*I was never qualified.*

*I worked for nine months on a reception desk*

*had to learn everything on the job.*

*I was always just getting by.*

*I wasn't challenging myself.*

In reflecting on his experience of learning at the Neighbourhood House and undertaking an internship, Peter said:

*This is the first time I've never found my own job*

*this is the first time I've been helped with a job.*

*I found that I got along with everybody quite well*

*I thought 'Oh well they've got this course coming up I think I'll check it out,*

*I'll just see what it is it can't be too bad.'*

*I did that and I really liked the place*

*and the Home and Community Care Course I did.*

*While I was doing that I volunteered for a few months.*

Within the first week of being at the Neighbourhood House, Peter realised how supportive everyone was of each other: having group discussions, being asked if anyone was struggling and needing help. He commented on the significance of the friendships they formed and the inspiration they gained from hearing the successes of past graduates. Peter commented on the impact of the journey and stories of ex-students who would come and share what they were doing now. He described them as 'pretty special heart-warming stories'.

*I'm really horrible at maths.*

*I'm improving*

*but there was a girl in there*

*really good at maths*

*she used to help me a lot.*

*We catch up once a month because*

*we all became very good friends.*

*We had fun all the time*

*we were always laughing.*

He admits that he was never good with books. He describes himself as 'better at hands-on' and learning best when shown or given examples and then trying it himself.

*I learnt that things take time,*

*you've got to work hard to get to where you want to be.*

Peter has been working in a local health service.

*Working in a setting like this*

*I'm challenged every day.*

*I do all sorts of stuff.*

*I've been here for four months now*

*my role just keeps developing.*

*I'm taking on new things,*

*leaving no things behind.*

*I want to help people.*

*I'm doing Administration at the moment.*

*In years to come*

*I'd like to be in Community Services or Youth Justice.*

It is interesting to note that while Peter expresses doubt about studies at university, he does not discount it as a future option.

*University has always scared me.*

*I never thought that I was good enough for university.*

*If I can finish this,*

*because I'm working full time .... doing a Certificate III in Business,*

*it's really in-depth,*

*requires a lot of work.*

*I think that I could raise the bar a little bit and try something else,*

*maybe not university straight away but*

*something a bit more higher level.*

### Sally: Learning English as a Second Language

Sally and her husband have been living in the local area for 32 years now. She describes having a 'basic education' before coming to live in Australia. Her highest level of education was Year 12. Following school, she learned commercial cooking up to level 2 and then she found work. Sally came to learn English at the Neighbourhood House.

*I came here to learn English*

*a second language for me,*

*English class level 4 and*

*computer class – to communicate in the social life.*

*My husband's the same,*

*he comes here too*

*to learn a second language.*

Her husband attends the Neighbourhood House for the same reason as Sally because, as she explains:

*Our English level is not very high,*

*it's just basic level*

*so we can communicate in English.*

Sally has been coming to the Neighbourhood House for some years now, however, she struggles to remember exactly how many years.

*Quite a few*

*'cause I learn at my own pace -*

*it's not easy to learn.*

It is not easy for Sally and her husband. When they go home after being at the Neighbourhood House they 'have other work to do'. Learning English has been the primary motivation for them coming to the Neighbourhood House. Friendships and acceptance underlie their continuing engagement with the Neighbourhood House.

*I'm really happy*

*I've made friends from different countries*

*Their culture –*

*makes diversity*

*We teach each other about culture and food –*

*give us fruit and sometimes …*

*each one brings a plate of food.*

*We share with each other.*

*Friendships, relationships and classes.*

Sally acknowledges that her 'English and vocabulary are improving'. In part, this improvement has been supported by activities in the classes where the learners read newspapers, listen to the news and discuss the news. She now has a heightened awareness and understanding of Australian society.

*I read the paper*

*I listen to the news*

*I know a little bit more.*

*I understand more about Australian culture,*

*history and society*

Sally says she likes learning 'very much' and is appreciative of what the Neighbourhood House offers her. She also expressed gratitude for being in Australia and having opportunities to participate in classes to learn English. She makes particular reference to reading the newspaper and discussing the news with fellow class mates and how this has helped her to learn more about particular social issues and topics.

*In class,*

*conversations about the news –*

*quite interesting.*

*Talk about news and social events.*

*Talk about homelessness.*

*Read newspapers and research things on computer.*

The added layer of learning to use technology (i.e. computer and search engines) to research topics and issues such as homelessness and significant social events has enabled Sally to develop a deeper understanding of Australian society and culture. For Sally, 'everything is interesting', however, she admits to finding tests 'very difficult'.

*I have difficulty listening sometimes*

*I'm not sure exactly what the word is.*

*I have difficulty learning language*

*because of the hearing – the accent*

*and things like that.*

The computer was initially challenging for her to learn, however, she is embracing and using technology at the Neighbourhood House and at home.

*The computer –*

*at the beginning – very hard for me.*

*Even today*

*I know a little bit,*

*not really much,*

*not everything,*

*just something basic.*

*At home I have a Notebook*

*I don't touch it much when I go home*

*I'm busy with other things,*

*but I like to use the iPad – for watching videos.*

Sally has had quite a few jobs in catering, for example, working in a dining room and helping in a kitchen. Currently she has a part-time job as a traffic flagger. While Sally admitted earlier to finding it difficult to learn a language and needing to learn at her own pace, she remains motivated to continue to learn English and computers and is open to other learning as opportunities arise in the Neighbourhood House.

*I want to keep learning computers and English or*

*maybe something else.*

## Discussion

### *Neighbourhood house habitus*

This research has uncovered the importance of Neighbourhood Houses as a welcoming social space of education and lifelong learning for adults, across various age groups – young, middle aged and older learners –

and in different stages of life transition such as times of reskilling and retraining for future work, returning to learn after raising children and learning to further develop English language skills. The case studies of Lesley, Peter and Sally exemplify the role of Neighbourhood Houses in providing a social learning environment that welcomes a diversity of people across a lifespan. To understand Neighbourhood Houses as spaces of adult education we need look to the learner, teacher and worker practices within houses themselves (Bourdieu, 1990). We have argued previously that it is the habitus in the practices, the dispositions and habits of the teachers, staff, volunteers and learners themselves that create an environment of inclusive pedagogy and practice (Ollis, Ryan, Starr & Harrison, 2018 in press). We have also argued the inclusive practices of Neighbourhood Houses relate to their history and connection to feminism and the women's movement. Many Neighbourhood Houses in Victoria were established to provide social and learning opportunities for women at home with young children (Lonsdale, 1993). Their initial inception was a welcoming space for women of diverse backgrounds, class, sexuality, culture and ability to learn, socialise and feel included (West, 1995).

The social space of Neighbourhood Houses is relaxing and informal. Classes are delivered using adult learning principles by drawing on the existing knowledge of learners, maintaining small class sizes and focussing on group work. Constructivist epistemology, scaffolding tasks are central to learner engagement. The pedagogy focusses on adult learners as sites and creators of knowledge, drawing on their past experiences and the existing knowledge that students bring into the classroom (Ollis, Ryan, Starr & Harrison, 2017). Education programs are frequently learner and community directed, there is an emphasis on facilitation rather than teaching, learners are able to co-construct curriculum and have input into learning programs that are run within the houses. The programs often reflect changing education needs in local communities with classes tailored and catering to skill-gaps in local workforces and at times focussed on retraining workers who have been made redundant in declining industries such as manufacturing. Neighbourhood Houses are democratic spaces of learning in the true Deweyan sense, where education and learning are linked to the needs of the local community and where curriculum and course content are enabled and enacted frequently by the learners themselves (Dewey,

1938). Freire (1998) argues the teaching space is a space that should be constantly read and rewritten by a mutual and ongoing dialogue between the teacher and student:

> *After all, our teaching space is a text that has to be constantly read, interpreted, written, and rewritten. In this sense, the more solidarity there is between teacher and student in the way this space is mutually used, the more possibilities for democratic learning will be opened up … (p. 89)*

Similarly, Crossan and Gallacher (2009) argue that to understand adult learning in community-based learning centres, we need to know the context of the relationships that are formed between learners themselves and between the learners and staff. They argue a key feature of the learning cultures within these spaces is the relationships between the students and staff, which are relaxed, informal and highly regarded by students.

## Social and incidental learning

Neighbourhood Houses have a kitchen and informal social spaces for learners to gather and socialise over a cup of tea or coffee. This generates a social space where friendships are formed, networks are established, knowledge is passed on through informal discussion and problem solving occurs through socialisation with others (Beckett & Hager, 2002). Informal learning also occurs through the activity of volunteers in Neighbourhood Houses. Volunteers participate in a range of different activities in the houses, assisting with the administrative work of the houses, being involved in the governance of the houses through to involvement on committees of management. Much of what we learn is informal, incidental and social (Marsick & Watkins, 2001). We learn through observing the practices of others, but we also learn through dialogue with others. We learn how to problem-solve in conversation with others, how to complete a task by observing the practice of others (Lave & Wenger, 1991). Sally learned a great deal from her new class friends about culture, language differences and food. Peter learned how supportive his class colleagues were and this encouraged him to learn. He learned maths by observing and being assisted by a member of his class who had advanced skills in numeracy. Lesley established new friendships and gained confidence in her abilities. Each one learned about their class colleagues' lives, struggles and past education

experiences, both positive and negative. They heard about successful education experiences of other learners in the classes – what they had achieved, what they had aspired to do. This was encouraging and built an understanding of their own capacity to be successful learners.

## Second chance learners

Both Lesley and Peter are second chance learners. They are learners who have not completed secondary school and who have had negative experiences of previous learning. As a result, they were not confident of their ability to learn. Many of the learners in this larger study are what we have identified as second chance learners. They come to the houses with complex social histories and they have usually not completed secondary school for a variety of reasons – they have had complex family lives, health issues, negative labour market experiences, learning difficulties, lacked family support and some were disengaged from, and struggled with, formal schooling. These learners are sometimes described as vulnerable learners, or disengaged learners, but they have also been described as hard-to-reach learners (Nechvoglod & Beddie, 2010). For these learners, reconstructing previously held negative experiences of formal education and learning is important. Social learning in the Neighbourhood House environment with others who have struggled in formal education settings, such as school, coupled with the emphasis on learner inclusion and using inclusive critical teacher pedagogies, assists learners to move beyond these negative past experiences and enabling them to recognise themselves as successful learners. We claim all adult learning is a project of identity formation. We learn to become a doctor, a teacher, a carpenter and an identity is formed around this particular occupation (Chappell, Rhodes, Solomon, Tennant & Yates, 2003). For second chance learners, their initial belief and identity as unsuccessful learners needs to be disrupted and reconstructed to reflect capable and successful learners.

The majority of participants in this research had negative experiences as learners, they struggled with their own identity of having not finished schooling, or feeling disengaged with education and schooling (Ollis, Ryan, Starr & Harrison, 2017). From a UK perspective, Crossan and Gallacher (2009) define the 'permeable boundaries' of learners and staff, in community based spaces of adult education, where, for a variety of reasons, relationships and learning combine together to build a

relationship of care and understanding of learners' lives. In Australian Neighbourhood Houses the philosophy underpinning the practices within the house is community development, community development aims to work with individuals and communities to empower the most vulnerable. It is here the Neighbourhood Houses disrupt the rigid linearity of the epistemology of 'learning progression' at the heart of neoliberal education policies and practices that assess and sort individuals according to their ages, performance and ability (Duckworth & Smith, 2017). However, important to this research is what Crossan and Gallacher (2009) describe as the horizontal relationships between learners and tutors where a 'learning relationship' exists as individuals learn through and from others and when … 'a human relationship has an impact on learners' fundamental dispositions to learning' (Mayers & Crossan, 2007 cited in Crossan & Gallacher, 2009, p.134). Hence at the heart of this education work are the relationships with learners and tutors, but importantly the relationships with learners and centre staff, many of whom have also been adult learners and volunteers in Neighbourhood Houses. What our research has affirmed, and what is fundamental to all adult learning but especially important in these community-based learning environments, is the primary importance of building relationships with learners.

## Conclusion

Neighbourhood Houses are busy spaces, providing numerous learning programs ranging from informal, non-accredited courses to more formal, accredited learning pathways – Certificates and Diploma courses – accommodating the needs of many and diverse individuals. This is reflected in the literature that describes numerous and non-linear transitions and pathway programs in Neighbourhood Houses that enable participants to engage in a range of activities before deciding what they want or need. They represent a place and space for engagement, activity, interaction and the building of social capital. In terms of lifelong learning in Neighbourhood Houses , we return to Edwards and Usher's (2007) proposition of lifelong learning being a socio-culturally embedded set of practices generated by activity and social engagement. The case studies outlined in this research have shown this to be the case and is in line with their claims that active knowledge formation occurs in a multiplicity of settings, sites and spaces

of activity. Neighbourhood Houses exemplify these forms of lifelong learning, learning for anyone at any stage across a lifespan, learning that is incidental, informal and socially embedded in the activities and involvement of learners, volunteers and workers. Learning socially through observation of successful learning journeys and practices are embedded in Neighbourhood Houses that are welcoming and inclusive of anyone who wants to learn or volunteer. They are particularly inclusive spaces for second chance learners who begin a journey of discovery learning from the moment they enter the houses.

Some of the outcomes for learners are important and lifechanging. Lesley volunteered in the community café and has undertaken several accredited units in hospitality. She has since transitioned to TAFE (vocational education college) and believes she is now ready to enter the paid workforce. Peter studied two certificate level courses, one in aged care and another in business administration. He has since gained work through a traineeship at a local health provider. Sally's later life learning in English and English language has enabled critical engagement with social issues, other cultures and engaged with ideas of civics and citizenship.

In the practices in Neighbouhood Houses we see remnants of the Delores report's purpose and intensions regarding the capacity for lifelong learning to impact on wellbeing and social cohesion of communities – not explicitly expressed as such, however, embedded in the habitus and practices of Neighbourhood Houses. The growing confidence about continued learning and future work prospects are evidenced in the case studies of Lesley, Peter and Sally. They are demonstrations of UNESCO's goals in action, highlighting the potential of education to transform learners lives through adult education within supportive and transformative social networks, towards decent work and more fulfilling lives.

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# How a blended learning environment in adult education promotes sustainable development in China

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*The study adopts a semi-structured survey to examine the effects of a blended learning environment in adult education in promoting sustainable development. The study analyses the development of blended learning environments in China, and some challenges that China faces in sustainable development. Based on the analysis results, the study revealed that a blended learning environment could promote adult education development, reduce the development inequality between genders and geographically, as well as protect natural environments. A survey to adult learners verifies the aforementioned conclusion. Adult learners believe that a blended learning environment is an eco-friendly learning environment; it increases the opportunities for females and those living in rural areas to become educated and promotes their sustainable development. The research results may be beneficial for education policy makers and practitioners interested in sustainable development.*

***Keywords:*** *sustainable development, equality development, adult education, China*

## Introduction

Terms such as 'sustainable development' and 'sustainability' attracted more and more attention after the Brundtland Commission delivered its report entitled *Our common future*. Sustainable development aims to promote current development as well as preserving resources for long-term growth (Kuhn & Deetz, 2008), which are usually defined as 'development that meets the needs of the present without compromising the ability of future generations to meet their own needs' (World Commission on Environment and Sustainable Development, 1987). The early part of this decade saw increased political will in promoting sustainable development. The Millennium Development Goals (United Nations, 2000) set a broad mandate for international development between the years of 2000 to 2015. It added political impetus to the argument that there cannot be sustainable progress towards the achievement of development goals without active and critically aware citizens. From the legacy of the Millennium Development Goals, the 2030 agenda (also known as *Transforming our world: The 2030 agenda for sustainable development*) emerged. It takes effect as 'a plan of action for people, planet and prosperity', which aims to 'free the human race from the tyranny of poverty and to heal and secure our planet' (United Nations, 2015). It has extended sustainable development out into a broader meaning, incorporating economic, environmental, social, and educational sustainability, including equitable development for every nation and every person (Bai & Sarkis, 2014; Fergus & Rowney, 2005). A total of 17 Sustainable Development Goals and 169 associated targets were set up for the 2030 agenda for the international community to reach in the next 15 years (United Nations, 2015). This aforementioned opinion of sustainable development is widely accepted and shared by specialists and institutions (Max-Neef, 2011; United Nations, 2017).

China is one of the active countries in the field of promoting sustainable development, both historically and contemporarily. One of the key components of traditional Chinese civilisation is to maintain harmony (Chinese word '*he*') between human beings and nature (ecological sustainability), and between human and human (social and economic sustainability) (Chan, Choy & Lee, 2009). The Chinese government has been participating actively in international conferences on the matter

of sustainable development, such as the United Nations Conference on the Human Environment (the Stockholm Conference), the United Nations Conference on Environment and Development (the Rio Conference) and the Johannesburg World Summit on Sustainable Development (the Johannesburg Summit). China has released plenty of policies on sustainable development as well. Among these policies the document entitled China's agenda *21: White paper on China's population, environment and development in the 21st century* (The State Council, 1994) is the most important one, which has been incorporated into national strategies, such as pursuing steady and rapid economic development, increasing people's living standards, improving population quality, and advocating resources conservation and environmental protection among people (Chinese Government, 2012).

The Chinese government believes that one of the most important strategies to construct a sustainable society is to promote education development (The State Council, 1994), especially adult education development with modern technology (The Ministry of Education of the People's Republic of China, 2016). An objective of the report entitled *To build a well-off society in an all-round way and create a new situation in building socialism with Chinese characteristics* delivered by the General Secretary of Communist Party of China and President of the People's Republic of China Jiang Zemin (2002) is stated as: 'A learning society in which all people can learn or pursue lifelong education will emerge to boost all-round development'. Since that time constructing a lifelong learning society and promoting sustainable development have become two of the most important goals in Chinese development.

Several official documents have been released, which aim to achieve the aforementioned two goals. The document entitled *The national ten-years educational reform and development program (2010–2020)* purposes to cultivate a learning society by the year 2020 and to promote sustainable development in Chinese society (The Ministry of Education of the People's Republic of China, 2010). Another official document entitled *The thirteenth national five-year plan* reaffirms the significant value of developing lifelong learning in promoting sustainable development. It states that society is required to widen the continuing education and lifelong learning channel, promote education information, develop distance education, and expand the

coverage of quality education resources (The National Development and Reform Commission, 2016). Adult education is not compulsory in China. Currently it is an important way for individuals to improve their working abilities. There are two kinds of teaching approaches in Chinese adult education: traditional teaching approach and e-learning teaching approach. These two teaching approaches have their own advantages and limitations. The former increases the opportunities for learners to communicate with their teachers and their peers but wastes time in travel between a student's home and university; while the latter decreases the opportunities to communicate with peers (Cao & Yao, 2015). Therefore, a new teaching approach is required to promote adult education and lifelong learning in China. In recent years, some measures for promoting lifelong learning and sustainable development have been suggested officially (The Ministry of Education of the People's Republic of China, 2016). Online learning, combined with traditional learning (that is a blended learning environment), is believed to have potential. Theoretically, with the characteristics of comfort and convenience for learning, a blended learning environment can enable more learners to attend continuing education, which will promote sustainable development. However, this suggestion is only a hypothesis. Thus, the current study tries to investigate and analyse in which way a blended learning environment promotes sustainable development.

## Studies on sustainable development related to education in China

*China's agenda 21: White paper on China's population, environment and development in the 21st century* highlights the important role of education in a sustainable development society, which aims to train researchers on sustainable development through educational courses, work-based training and extension activities (The State Council, 1994). *The 1995 education law of the People's Republic of China* reaffirms the vital roles of education in promoting sustainable development (the National People's Congress of the People's Republic of China, 1995). Another document entitled *The higher education law of the People's Republic of China* echoes the aforementioned two documents and reiterates the irreplaceable role of education in promoting sustainable development, such as training at senior levels and progressing scientific, technological and cultural changes (the National People's Congress of the People's Republic of China, 1998).

Tsinghua University is a pioneer in education for sustainable development in China (Zou & Zhao, 2015). Tsinghua's strategies for sustainable development can be concluded into 'one principle and three dimensions'; 'one principle' means to build a green university; 'three dimensions' is composed of the three conceptions of 'green education', 'green research' and 'green campus' (Zhao & Zou, 2015). Tongji University is another important member in promoting sustainable development in China. This university, combined with 31 other universities, has signed the *Tongji manifesto*, which advocates that more universities assume greater responsibility for sustainability (Lu & Zhang, 2014; Yuan, Zuo & Huisingh, 2013). Tsinghua University and Tongji University are influential universities in China and worldwide. They have become models for other universities in China in promoting sustainable development. From this time on, more and more universities have begun to accept the green university initiative.

There is a lot of literature focussed on sustainable development for education in China. These previous literature can be grouped into three broad research aspects. The first type of study is to analyse and examine laws and policies related to education for promoting sustainable development (Niu, Jiang & Li, 2010). The second type of study is case studies about Chinese universities with a descriptive or social contextual analysis (Geng, Liu, Xue & Fujita, 2013; Yin, 1989; Yuan et al., 2013; Zhao & Zou, 2015). The third type of study is comparative studies, which compares sustainable development among different levels of Chinese universities (Zhao & Zou, 2018) or universities in China and abroad (Holm, Sammalisto & Vuorisalo, 2015; Zou, Zhao, Mason & Li, 2015). These studies indicate that China's green university initiative usually pays attention to traditional formal education on environmental protection; while few studies have taken a look at other types of education, such as adult education or continuing education. In addition, few studies have analyzed the roles of education in promoting sustainable development other than environmental protection.

### *Challenges that China faces in sustainable development*

As a developing country with a population of more than 1382 million (The National Bureau of Statistic of the People's Republic of China, 2016), China encounters challenges from different aspects in sustainable development, such as environmental problems (Lam, 2011; Zhai, Reed

& Mills, 2014), energy security problems (Liu & Jiang, 2009), economic development problems (Bai, Sarkis & Dou, 2015) and traffic problems (Zhao, 2012). Excluding the aforementioned problems in sustainable development, a huge imbalance is evident between males and females and between those in cities and in the rural areas, who face some of the most dire development challenges. This imbalance contradicts the purpose of the *2030 agenda*, which aims to achieve gender equality and reduce inequality within and among countries (United Nations, 2015).

Traditional Chinese society discriminates against females; for example, a woman is traditionally expected to do all of the housework and affiliate to her husband for life. One of the concepts hindering women in obtaining equal position with men is that women's educational rights have been expropriated. Traditional Chinese culture advocates that it is a desired virtue for women to be illiterate. Though modern Chinese society has elevated women's social position (Yao, 2013), there are still some obstacles hindering female equality. One of the most significant obstacles is the access to education. Many more girls drop out of school in their early years compared with boys. The data from the Population and Employment Statistics Division of National Bureau of Statistics of the People's Republic of China (2016) illustrate the differences between males and females in access to education and in education quality: among those over 6 years old, 8.27 per cent of females do not access formal education, and among those over 15 years old 8.01 per cent of females are illiterate; while the rate of males is only 3.22 per cent and 2.08 per cent, respectively. Females do not have the same opportunities to be educated as males do, which undermines their opportunities to improve themselves and hinders sustainable development in the area of gender equality.

Another factor affecting sustainable development in China is the huge gap between those living in cities and those in rural areas. According to the National Bureau of Statistics of the People's Republic of China (2017), per capita disposable income, the per capita consumption expenditure, and the medical technical personnel in health care institutions per 1000 persons, are all 2.7 times greater in cities than those in rural areas. The most important reason that has led to this huge gap is the lack of highly qualified human resources in rural areas. Education is the essential factor that hinders sustainable development

in rural areas (Han & Du, 2012), as modern science and technology play a vital role in personal development, community development and national development. The data from the Population and Employment Statistics Division of National Bureau of Statistics of the People's Republic of China (2016) clearly illustrate the differences in the rates of those educated in cities, towns and rural areas: those over 6 years old without access to formal education in cities, towns and rural areas are 2.29 per cent, 4.97 per cent and 8.65 per cent, respectively; while the illiteracy rates are 1.99 per cent, 4.71 per cent and 8.57 per cent in cities, towns and rural areas, respectively. That is to say, there are more individuals in rural areas without access to education than those in other areas, which is the essential factor leading to unsustainable development across different areas (Alonso-Almeida, Marimon, Casani & Rodriguez-Pomeda, 2015; An, Davey & Harun, 2017; Ceulemans, Lozano & Alonso-Almeida, 2015).

### *Adult education and sustainable development*

Previous studies (Bai et al., 2015; Geng et al., 2013; Han & Du, 2012; Holm et al., 2015; Lam, 2011; Liu & Jiang, 2009; Lu & Zhang, 2014; Niu et al., 2010; Yin, 1989; Yuan et al., 2013; Zhai et al., 2014; Zhao & Zou, 2018; Zhao, 2012; Zou et al., 2015) have explored sustainable development in China related to education and some challenges that China faces in sustainable development. Both policy makers and scholars have contributed a lot to promote sustainable development in China. However, they usually pay attention to traditional formal education on environmental protection. Few studies have taken a look at other types of education, such as adult education or continuing education, in promoting sustainable development. In addition, few studies have analysed the role of education in promoting sustainable development other than environmental protection. Thus, the current study tries to analyse in which way a blended learning environment in adult education promotes sustainable development in China.

## Research methods

The methods adopted in the current study are literature analysis and a semi-structured survey. The former is used to analyse the connection between sustainable development and adult education, especially

adult education in a blended learning environment; the latter is used to examine adult learners' viewpoints on the effectiveness of a blended learning environment in promoting sustainable development.

The literature analyses performed for this paper are based on constant comparative analysis via an iterative process, reflecting on the authors' understandings and interpretations of sustainable development and the characteristics of a blended learning environment in adult education. It follows a similar approach to the constant comparative analysis used in Grounded Theory (Bryman, 2004), where the initial framework for analysis is done in the context of (1) the dimensions of sustainability such as equality among human beings and environmental factors, and (2) the characteristic of a blended learning environment in adult education. The analyses have been done based on the author's interpretations of how a blended learning environment and sustainable development are related.

Secondly, this study uses a semi-structured questionnaire to survey learners' viewpoints on the effectiveness of a blended learning environment in promoting sustainable development. The questionnaire is designed and validated through a number of steps referenced to Jorge, Madueño, Cejas and Peña. (2015) and Pérez-Foguet et al. (2018). Firstly, an extensive literature review, specifically related to sustainable development (Bai & Sarkis, 2014; Fergus & Rowney, 2005; Kuhn & Deetz, 2008; Max-Neef, 2011; United Nations, 2015; 2017; World Commission on Environment and Sustainable Development, 1987), and sustainable human development (Barth & Rieckmann, 2012; Pérez-Foguet et al., 2018), has been performed. The questionnaire is then designed and validated by a pretest in North China University of Science and Technology, Tangshan, China. The pretest results show that the reliability and the validity of the questionnaire are 0.82 and 0.85, respectively, which is valuable enough as a tool to investigate the learners' authentic opinions on the effectiveness of a blended learning environment in promoting sustainable development. The questionnaire is comprised of six closed questions, employing a five point Likert scale from 'strongly agree' to 'strongly disagree'. And then, a second validation of the survey is conducted in North China University of Science and Technology. Two hundred adult learners took part in the survey. Finally, the subjects in the study and the survey results are as follows: there

are 168 valued questionnaires totally, 91 of which come from female learners while 77 from male learners, and 88 of which are finished by learners in rural areas while 80 in cities. All the subjects in the study majored in engineering.

## Adult education and blended learning in China

Adult education was established as early as in 1949, the year the People's Republic of China was established. In the first decade, adult education served as the most important strategy to eliminate illiteracy. Unfortunately from 1966 to 1976, Chinese society veered in a different direction. At that time, formal education in China was transferred into a 'moral cultivation institution' and adult education was forbidden by the Chinese government. In 1978, Chinese government re-established the adult education system. The updated official statistic data revealed that in 2016 the number of adult education students in tertiary schools was up to 12,293,212 (The National Bureau of Statistics of the People's Republic of China, 2017).

In recent years, blended learning environments have appeared in China, contributed mostly by textbook publishers. In order to enhance the publisher's competitiveness and help learners improve their academic performance, some textbook publishers have offered supplement online learning materials in their learning management system (LMS) and established some online discussion forums for learners. Thus, some universities in China tried to explore the blended learning classes in both adult education and formal education, in which students learn their lectures online and off line.

Generally speaking the nucleus structure of a blended learning environment is composed of three parts: task based online learning, group based peer learning and class based face-to-face traditional learning (see Figure 1).

In the online learning part, it is necessary for every learner to access a computer with multimedia software and connected to the Internet. To guarantee access, the Internet speed must be fast enough for all learners to use it at the same time. In addition, the capacity and the size of the LMS must be large enough. Before each lecture in a classroom, teachers release

learning materials and some tasks on the LMS to the learners. Learners are required to study the learning materials and finish their assignments. They can search online for the required information and required skills to finish their tasks. At the next stage, learners share their understanding and information of the task with their peers on the Internet forum or face-to-face with each other. They are required to comment on their peers' tasks and learn from each other. If learners encounter some difficulties, they can ask for help from their teachers through the LMS. In the classroom lecture, learners present what they have learned to their teacher and their peers. The teacher evaluates what the learners have learned and solves the questions that learners meet in their acquisition. The teacher is also required to interview learners to become familiar with the learning activities and offers some suggestions to learners. After the lecture, assignments are given, which the learners are required to finish on the spot. The teacher marks the assignments on the spot as well. If the teacher finds a learner has difficulties in learning, s/he will tutor the learner individually. Figure 1 illustrates the teaching model.

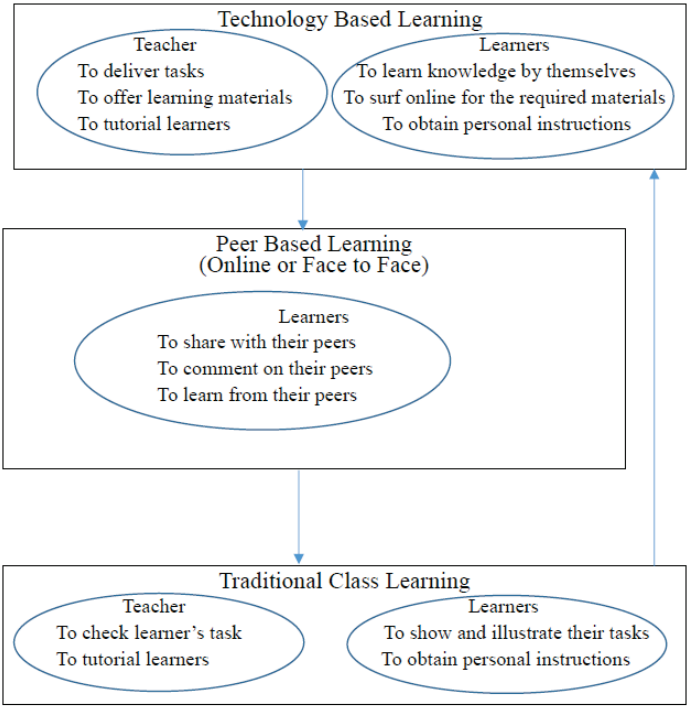


**Figure 1: A blended learning environment.**

## Discussion

A previous study (Yao, 2017) has verified that a blended learning environment can assist learners in improving their academic performance. The current study finds that a blended learning environment can promote sustainable development as well.

### *Adult education and sustainable development*

Previous studies have indicated that education plays an important role in promoting sustainable development (Alonso-Almeida et al., 2015; An et al., 2017; Ceulemans et al., 2015). Of course the education here includes both formal education and informal education, such as adult education and continuing education. The Chinese government has paid great attention to adult education for a long period of time. In May 2001, the President of People's Republic of China (Jiang, 2001) called on the government to build a learning society. From the year 2004 to the year 2008, the number of tertiary students in adult schools increased from 4,197,956 to 5,492,949 (The National Bureau of Statistics of the People's Republic of China, 2005; 2009), owing to the ease and convenience of adult education regarding enrolment and attendance. However, from 2009 on the number of tertiary adult students hovered at its former levels, even decreasing slightly (The National Bureau of Statistics of the People's Republic of China, 2010; 2011). Current society has required a new learning environment to promote adult education. In May 2015, the International Conference on Information Communications Technology in Education was held in China. At its opening ceremony, the President of People's Republic of China Xi Jinping (2015) delivered a welcome letter and called on the government to build a society in which every individual could learn anywhere and anytime. A blended learning environment meets the requirements of promoting adult education development, especially for females and those in rural areas.

The current study includes a survey to examine learners' opinion about the effectiveness of adult education to sustainable development. Half of the learners in the survey strongly agreed that 'it is convenient to participate in adult education in a blended learning environment'. Fifty three learners agreed with this opinion; another 31 learners neither agreed nor disagreed with this opinion. No other options were selected. Further analysis showed that more female learners (58.2%) or those in

rural areas (61.4%) strongly agreed with the opinion than male learners (40.3%) or those in cities (37.5%), respectively. The results of Spearman's correlation analysis show that the aforementioned differences are significant (both ps equal to 0.001, and are less than 0.05). Given the convenience of learning activities in a blended learning environment, 75 learners in the survey strongly agreed that they hoped to continue education when they graduated from school; 65 learners agreed with this opinion; another 28 learners neither agreed nor disagreed. Other options were not selected. Further, the results of Spearman's correlation analysis found that the differences between female learners and male learners ($p = 0.600 > 0.05$) or between learners in rural areas and those in cities ($p = 0.778 > 0.05$) were not significant. Figure 2 and Figure 3 reveal the detailed survey results on the aforementioned two questions vividly.

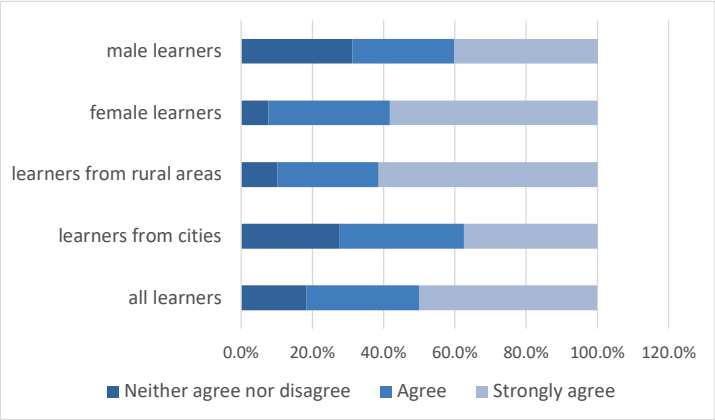


**Figure 2: Response to the question – 'It is convenient to participate in adult education in a blended learning environment.'**

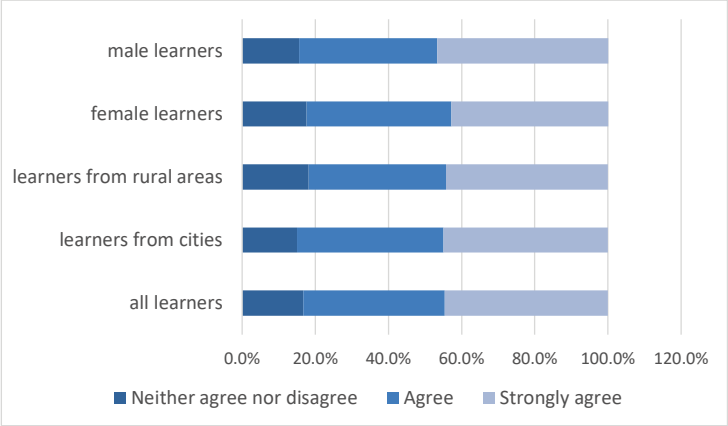


**Figure 3: Response to the question – 'I hope to continue my education when I graduate from school'**

## Protecting natural environment

The education sector should not only aim to teach sustainable development knowledge, but also act and develop sustainability itself (Velasco & Harder, 2014), such as the building of green campuses (Zhao & Zou, 2015), or setting up systemic sustainability educational courses (Lozano et al., 2017). Compared with a traditional learning environment, a blended learning environment can promote sustainable development. Firstly, a blended learning environment is an eco-conscious learning environment. In a traditional learning environment, at least in China, learners are often required to hand in hard copy assignments, which consume a lot of paper. While in a blended learning environment almost all the assignments are handed in online, which decreases the consumption. Secondly, a blended learning environment can lighten the learners' burden of commuting. Learners in a blended learning environment are required to learn at home with a computer. They are not required to drive from home to university every day, decreasing carbon consumption and reducing traffic congestion. This study indicates that a blended learning environment can decrease paper consumption and carbon consumption, as well as lighten traffic congestion, which is a valuable way to promote sustainable development.

The survey results in this study verify that Chinese adult learners have drawn similar conclusions. One hundred learners in the survey

strongly agreed that 'a blended learning environment decrease learners' consumption of paper and the other office supplies'; 55 learners agreed to this opinion; another 13 learners neither agreed nor disagreed. No other options were selected. Further analysis showed that more male learners (62.3%) or those in rural areas (63.6%) strongly agreed with that opinion, compared with female learners (57.1%) or those in cities (55.0%), respectively. However, the results of Spearman's correlation analysis show that both differences are insignificant ($p = 0.543$ and 0.212, respectively – both are more than 0.05). On the other hand, 96 learners in the survey strongly agreed that 'a blended learning environment lightened their travel burden from home to the university'; 51 learners agreed with this opinion; another 21 learners neither agreed nor disagreed. No other options were selected. Further analysis revealed that more learners in rural areas (62.5%) strongly agreed with the opinion than those in cities (51.3%); and the ratio of female learners (58.2%) who strongly agreed to this opinion is a bit higher than that of male learners (55.8%). However, the results of Spearman's correlation analysis show that both differences are insignificant ($p = 0.431$ and 0.204, respectively – both are more than 0.05). Figure 4 and figure 5 reveal the detailed survey results on the aforementioned two questions.

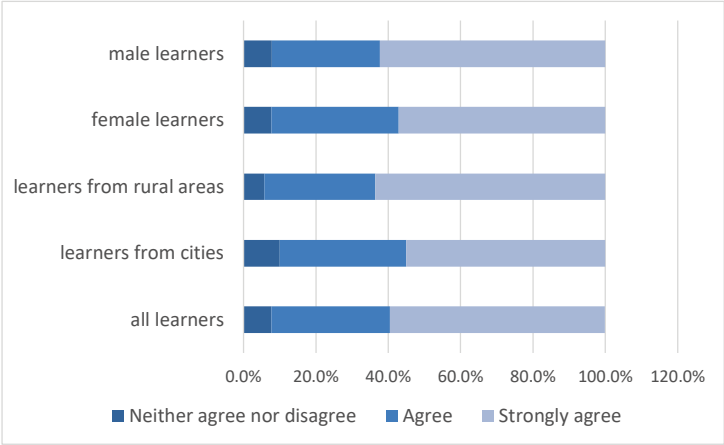


**Figure 4: Response to the question – 'A blended learning environment decreased my consumption of paper and the other office supplies'**

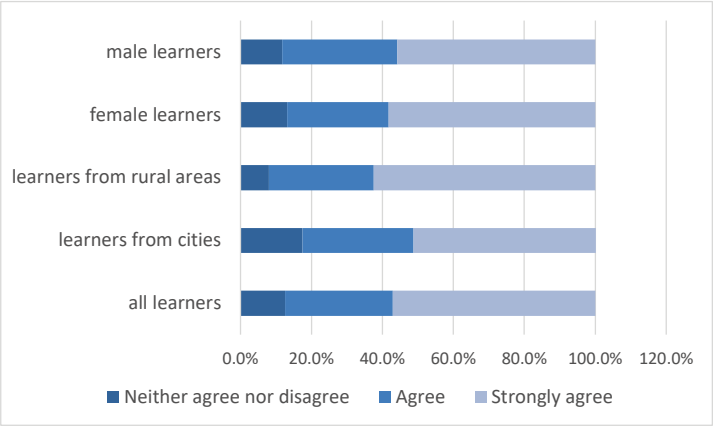


**Figure 5: Response to the question – 'A blended learning environment lightened my efforts on travelling between home and the university'**

### *Achieving gender equality and reducing inequality between cities and rural areas*

The imbalance between males and females and between cities and rural areas hinders sustainable development in China. One of the essential factors which has led to the imbalance is education. Facing discrimination rooted in traditional Chinese culture, females in China do not have the same access to formal education as males do. Because of political reasons and historical reasons Chinese universities are usually located in cities. For economic reasons and geographical reasons, those in rural areas cannot access formal education as easily as those in cities. With a newly designed blended learning environment, a woman can study as well as continue with her household obligations. She needn't alternate between being a housewife and a tertiary learner. On the other hand, a blended learning environment can bridge the geographical gap between cities and rural areas in education, as learners needn't go to schools every day. Hence, these results suggest that a blended learning environment can offer females and those in rural areas the opportunity to be educated as other learners, which helps achieve gender equality and reduce inequality between cities and rural areas.

Eighty-five learners in the survey strongly agreed that 'they become more confident in themselves after they take part in adult education';

62 learners agreed with this opinion; another 21 learners neither agreed nor disagreed. No other options were selected. Further analysis revealed that the ratio of female learners (51.6%) who strongly agreed to this opinion is a bit higher than that of male learners (49.4%), but the differences are insignificant ($p = 0.815 > 0.05$); while more learners in rural areas (58.0%) strongly agreed with the opinion compared with those in cities (42.5%), and the differences are significant ($p = 0.024 < 0.05$). On the other hand, 133 learners in the survey strongly agreed with the point that 'adult learning experience is beneficial to their future career'; 22 learners agreed with this opinion; 13 learners neither agreed nor disagreed to this opinion. No other options were selected. Further analysis revealed that more learners in rural areas (80.7%) strongly agreed with the opinion compared with those in cities (77.5%), but the differences are insignificant ($p = 0.655 > 0.05$); and the gender difference to this question (79.1% vs. 79.2%; $p = 0.991 > 0.05$) is indistinguishable. Figure 6 and Figure 7 show the detailed survey results on the aforementioned two questions.

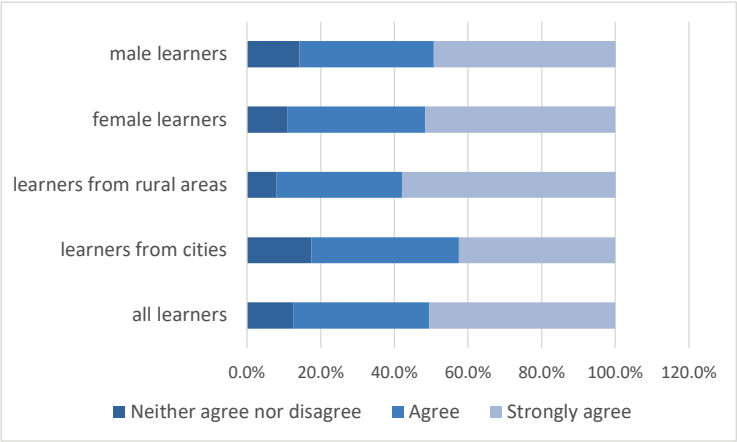


**Figure 6: Response to the question – 'I become more confident on myself after I took part in adult education'**

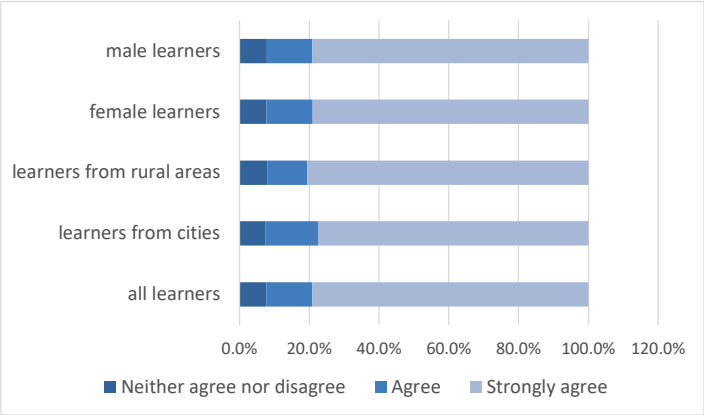


**Figure 7: Response to the question – 'Adult learning experience is beneficial to my future career'**

## Conclusions and future perspectives

Sustainable development is one of the essential goals for every country or district, including China. Currently, China is confronting several challenges in promoting sustainable development. This includes unbalanced development between females and males and between rural areas and cities. This study finds that a blended learning environment can promote adult education development, reduce the development inequality between genders and geographically, as well as protect natural environments.

Firstly, with the characteristic of comfort and convenience for learning, a blended learning environment promotes the sustainable development of adult education. With a blended learning environment the numbers of tertiary students in adult education increase rapidly. Next, a blended learning environment is an eco-friendly learning environment, as learners in a blended learning environment almost rarely hand in hard copy assignments and do not commute from home to the university every day. Thus, a blended learning environment is helpful to construct a resource-saving society. Furthermore, a blended learning environment bridges the gap in sustainable development between females and males and between those in rural areas and those in cities. It increases the opportunities for females and those in rural areas to be educated and

promotes sustainable development in these areas. More importantly, the survey results reveal that female learners or those in rural areas prefer a blended learning environment, compared to other learners in general.

Previous studies have verified the effectiveness of new technology or new teaching approach in promoting sustainable development. One study (Azeiteiro, Bacelar-Nicolau, Caetano & Caeiro, 2015) reports that e-learning in higher education can be of great relevance to effective lifelong learning for sustainable development in a population of students who are simultaneously full-time employees. Pérez-Foguet et al. (2018) reports that an online learning environment can promote sustainable human development in engineering degrees. The current study draws similar conclusions as the aforementioned studies. More importantly, the study finds that female learners or those in rural areas prefer a blended learning environment to other learners.

Looking back on the study, we can find several limitations in it. Firstly, the study tries to answer the question how a blended learning environment promotes sustainable development in China. As it is very difficult to find any 'official data' to illustrate the relationships between a blended learning environment and sustainable development, the evaluation of the effectiveness of a blended learning environment on sustainable development in the study is based on some students' perception only. Although students' perception can answer the question in some way, the lack of hard evidence to support the conclusion is a limitation in the study. Secondly, the study investigates students' perception on the effectiveness of a blended learning approach on sustainable development with a questionnaire. In the questionnaire there are six closed questions, with two questions focussing on each dimension. The questionnaire only includes a small part of the concept of sustainable development and the study only gets 168 valued questionnaires. It is better to enlarge the number of questions to include more concepts of sustainable development and increase the numbers of the subjects. Thirdly, the study takes China as an example and all the data have been obtained in China. Whether the results can be used in other countries or districts, is still unknown.

We hope this study will be of use to education policy makers and practitioners interested in sustainable development. However, this study

is only tentative research in a Chinese context. Future studies could possibly explore how blended learning environments improve sustainable development in different countries or districts, and compare the findings. We will continue this study and try to find out the most appropriate pathway for sustainable development through advanced technology.

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# Achieving LLL with the Sustainable Development Goals: What is needed to get things done?

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*The need for individual, community and institutional lifelong learning grows and changes with turbulent social, political and economic change. The national adult education non-government organisation (NGO), Adult Learning Australia, can influence the course of policy-making and ultimately the national culture through diverse activities within or started through #YOLL2018.*

***Keywords:*** *lifelong learning, sustainability, Sustainable Development Goals, Adult Learning Australia, #YOLL2018, politics, culture*

## Changing words in a changing world[1]

### *Words that change their meaning*

Adult Learning Australia, with perhaps a gentle humour rare among similar adult education bodies, and most politicians, takes as its symbol

[1]This paper addresses issues that are global and generic but with the Australian context and an Australian readership particularly in mind.

the chameleon. This little fellow changes colour and appearance to camouflage itself – to appear different and if possible invisible to survive in different surroundings. Is that the way we behave in our own fast-changing and not always hospitable surroundings? Does this if so display a common-sense instinct for sustainability and survival; or do we detect a whiff of pragmatic cowardice, an echo of the Vicar of Bray[2]? Are we hard-nosed growth economists or soft-headed social reformers? Or maybe, and with consistency, both?

Like fashions that must change frequently to survive, many flavour of the year words come and go. More seriously, keywords change their ownership and meaning almost as fast. Being successful in lobbying and selling means using new buzz-words for new things, or finding attention-seeking new gimmicks. Maybe some become keywords for old things that abide and are long-lasting beneath the surface. Sometimes a really new understanding may follow. We need to run lifelong learning and sustainability through such tests as these. Both are twenty-teens flavours of the decade to be used with thoughtful care. Are they really new? Do these familiar terms carrying new more powerful meanings? Do they enable us as campaigners to 'capture the narrative' of policy-makers, the mass and social media and opinion leaders, enabling us as lobbyists to command attention and respect and to bring on action? There is a danger that by their familiarity they reassure rather than mobilise, allowing us to get on with business as usual.

## LLL in Australia – from Ideal to Real?

This paper is written as a response and a contribution to the ALA Year of Lifelong Learning (ALA 2018a) and its aspiration, as expressed in the invitation to the Summit on 17 April 2018, to celebrate 'the power of people continuing to learn throughout their lives'; both 'to join us in our planned activities or you might want to devise your own events or actions to highlight the benefits of lifelong learning'. The overall purpose and outcome was to devise a national Australian policy on lifelong learning and to put this to the federal government. As ALA completes this task, however, let us think a little about what that government can

[2]A historical character who won attention if not notoriety in an earlier time of political and ideological-religious tension in England, by changing his Church affiliation as national power changed hands back and forth. Few local reputations have survived the centuries as robustly!

and will do: what moves it to action, and what can as well be kicked down the road?

#YOLL2018. Another Year of Lifelong Learning (LLL). The first such year that I remember was the European YOLL in 1996. Scanning the policy landscape and referring to the first global LLL conference held in Rome in 1994, the ALA Discussion Paper stated that 'back then lifelong learning was equated with formal and institutional adult education', before noting the wider meaning ascribed to it within OECD in 1996. Statutory advice in 2000 to the Australian Minister for Employment, Education and Training is then cited and described as 'a broader view of lifelong learning that incorporated 'economic as well as social and cultural considerations'. (ALA 2018b, p.5)

In fact that period saw precisely the opposite: a sharp narrowing down of the meaning LLL to become little more than what we often now call VET (Vocational Education and Training), in place of the far broader socio-cultural vision of the term in and from the early seventies. Back in 1973 an influential OECD publication was called Recurrent education: A strategy for lifelong learning (OECD 1973). This followed closely the visionary UNESCO Faure Report Learning to be (Faure, 1972). The meaning of LLL is often contested but there is agreement broadly that around 2000, reflecting the broader ideological consensus favouring neoliberal economics and competitive individualism, 'second generation LLL' emerged as a much narrower aspiration for skills and related attributes to support national and individual economic success.

A question for ALA in 2018 is whether its policy paper adheres to this mainly economic focus, or whether it favours the emergent 'third generation LLL' vision which reverts to a wider socio-cultural ambition for a healthier society in a healthier environment: that is, something that matches the fine add-on, feel-good words of many LLL statements, and rebalances the economic with the social (see for example UNESCOs later key documents such as UNESCO UIL, 2010, UNESCO, 2015a and b, also Yang and Valdes-Cotera, 2011). This means supporting learning in all its forms for the many critical issues, ecological and environmental as well as social, civic and political, that run alongside technological change and enable people to gain new skills and new employment.

Put it another way: will ALA hitch its wagon to the Sustainable Development Goals (SDGs) and lobby for LLL in Australia to work for

all seventeen of the Goals (compare Hinzen & Schmitt, 2016)? Attaining the SDGs in Australia as part of a global vision for the amelioration of the predicaments of humankind may be a more robust platform for arguing that LLL is essential and must permeate all we do as a nation, than begging for more money for adult learning per se.

What can ALA do best to bring on a LLL reality in Australia? In an interconnected world, many things can at least be started in 2018. One example is practical campaigns with a LLL element woven in; ways of doing that demonstrate community as well as individual learning; supporting other causes where we see LLL as a key missing element. Different on-the-ground local activities may help nurture a culture receptive to LLL, which helps a White Paper to be taken seriously, rather than shelved.

## How the world we know came about, and the reality now

This ALA paper asks how the concept and practice of lifelong learning (LLL) relates to the formal education system to which it is shackled in policy terms. That formal system emerged with the modern national state, the essential element of modern governance to emerge from 19th century state-making (see Tandon, R., PIMA Bulletin, 2018), a period followed by a half century dominated and reshaped by two World Wars. The process of modern state-making continued through political decolonisation. Then for the wealthy world occupied by Australia and other OECD nations, there was the short-lived hedonistic growth of the third quarter of last century. From there we went off-piste into four subsequent decades of the disjointing change and uncertainty that we know today.

The 19th century triumph of the nation state was curtailed by the creation of super-national political authorities: what we call international organisations or IGOs. The UN system, other clubs of nations like the OECD, and regional bodies such as the European Union (EU) are technically governed by the nations, as Member States. Mirroring and often powerfully influencing the IGOs have been the International Non-Governmental Organisations (INGOs) where our AE and LLL leaders spend much time and energy trying to shape policy and exercise pressure on the Member States. These relationships are now increasingly often fraught and can end in deadlock; witness the era

of Donald Trump in the US, and of Brexit in Britain and Europe. Putin in Russia and Xi in China. How influential are the IGOs in steering their Member Governments, and specifically federal Australia? Do we as citizen activists look upward and pull down strength from UNESCO and others in the UN family of agencies; or mobilise petitioners and marchers to exert pressure from below; or both?

Nation states are further weakened by the power of international financial markets and the 'invisible private sector'. These exercise fiscal control and power over nations, behind and above the familiar company names that most citizens think of as the private sector. An unresolved and little acknowledged battle for control exists between States, IGOs, and big financial corporations, largely hidden from the eyes of active Jenny and John Citizens who want to make the world, or at least their corner of it, a better place to live. The citizen, individually and collectively as civil society, has been atomised by the competitive sink-or-get-rich world of individualism created by Reagan, Thatcher and their scriptwriters.

The civil society to which ALA and its sister NGOs like Germany's DVV and the now deceased and mourned United Kingdom's NIACE belong is both threatened and empowered by new information and communication technologies (ICT) in the form of Social Media and Big Data. One high-drama personal sob or glory story can move the political process faster than a dozen lobby groups, committees and commissions of inquiry. Well timed and well managed people's petitions make anxious opinion poll-watching politicians notice and act. In this complex ever-changing world, no longer neatly classifiable into Public, Private and Third sectors, 'lifelong learning' has become a buzzword de rigeur. It is like the sticker 'organic' that gets attached to every conceivable product. It is the world that the ALA chameleon inhabits, flicking out a sticky tongue to collect what it can. The productive and useful survival of LLL may best be secured through practising and preaching LLL attitudes, behaviours and policies that change that world for the better by influencing what happens in all Departments of State, and in industrial and civic activities. Some of this will require State support.

LLL is a keyword in the political and possibly by now in the ordinary conversation of our time. Sustainability is becoming similarly familiar and well used, mainly because of global warming and other critical

ecological issues. The term has now extended out from the environment to sustainable survival of institutions and practices from health, industry and education to community, culture and indigenous wisdom.

## The Sustainable Development Goals and education

The Sustainable Development Goals (SDGs) succeeded the Millennium Development Goals (MDGs) in 2015 (UNDP 2000). Both were products of the best planning efforts at their times of the totality of nations through the pinnacle IGOs, with the input and influence of a host of civic and private sector lobbyists. Each sought to make the world a better place: the MDGs for the years 2000 to 2015, the SDGs for the next fifteen years, to 2030.

Education featured rather weakly in the finally settled MDGs; adults' and lifelong learning were well-nigh invisible. The MDGs were not without achievement, but were none the less regarded as disappointing, no more so anywhere than apropos the education of adults which was eclipsed by schooling for all and efforts to reduce school exclusion and illiteracy. The learning needs of adults fared better in the lead-up to the SDGs, an achievement of well-organised global civil society lobbying led by NGOs like the International Council for Adult Education (ICAE) and the Asia South Pacific Association for Basic and Adult Education (ASPBAE), with their country-based member organisations operating in each nation state. The fourth SDG Goal is explicit about the need for lifelong learning for all: children, youth, and adults. Beyond Goal 4 there hovers, however, the question whether and how far LLL is essential to and therefore should permeate all the Goals. Can we achieve essential ecological and human society sustainability if LLL remains in its own box alongside sixteen other boxes?

LLL and sustainability are about more than just economic performance, growth and relative ranking position. What kind of life, society, and way of living is it really worth fighting to sustain? Which shade of LLL does our chameleon now choose?

The adoption, at any rate in principle, of a policy of compulsory primary education for all was rolled out across nations from the late 19th century on. It swept up into its mission in the later years of the 20th century an imperative for universal literacy, as newly created nations progressively gained independence. Literacy itself is a term in evolution,

changing in meaning and application as new needs and new information technologies arise.

This educational priority persisted into the MDGs and is still a main focus of education policy – and of the scope of what we consider to be the education system and sector. Sadly, the clear tough thinking needed to demand and help create a learning-for-all society is undermined when, as is so normal, lobbyists and politicians, and maybe too our own chameleon, shift language between 'education' and learning', thereby losing the simple clarity that political leaders need. 'Learning' may sound nicer and more democratic than 'education' (instructional, didactic). But it carries risks: 'You want learning? Fine, go away and do it.' 'You want education: oh that means teachers, schools, and real money …' Even today Lifelong Learning and Lifelong Education are used casually, interchangeably. The granddaddy of LLL journals still carries the name International Journal of Lifelong Education, in defiance of de-schooling advocates, the OECD insight of recurrent education, and Illich and Verne's nightmare (Illich & Verne, 1976) of being imprisoned in a global classroom.

We must be clear in what we say and not fudge what we mean. If it is real money for real educational support like buildings and staff, make that clear and don't mess with the words. If we can manage mainly by collaborating with others, so much the better.

## From 'former' to future: the example of lifelong learning prospects in Macedonia

Let us look at a country far from Australia and even remote to most of Europe in history, character and good fortune as well as geography, for an example of how events may conspire to bring a LLL policy from little more than fantasy to serious possibility, even probability. The landlocked Balkan State that its residents call Macedonia includes 22 per cent ethnic and linguistic Albanians and several other minorities: Greeks, Bulgarians, and Montenegrins; as well as the Macedonian-speaking majority. Its official name in UN parlance is still FYROM: the Former Yugoslav Republic of Macedonia, even though that might yet change following the political agreement with Greece. Its small size and differentness make it a nice microcosm for several important issues, easier to see than that which is close up and subsumes us. The SDGs

barely feature here, a reflection of the country's ambiguous status as a small poor country on a rich 'colonial-donor' continent, where (as in Australia) the SDGs tend to be seen as for other people, in an overseas aid context. The EU project TOR (terms of reference) came from another direction, not global UN development ambition but quest for European integration; yet the strategic policy issues and problems are essentially the same.

Where 'modern' Australian settler history spans two centuries, what we call Macedonia claims a legacy of over two millennia. Alexander the Great is celebrated in the name of the airport and the airport-city highway, and by means of gigantic statues of both him and his father in the central square of Skopje. All this is likely about to change as 2018 dies away. The 'other Macedonia' comprises roughly the northern half of Greece, a proudly nationalistic country which asserts its exclusive ownership and legacy of the great Alexander, and of the name of Macedonia. Many Greeks deeply resent the rival claim. New less assertively nationalist governments in both countries now open the prospect of albeit grudging and contested reconciliation over an agreed name (Northern Macedonia). Passions run high. There is no sign that civic education equips ordinary citizens to favour and support wise and long-sighted decisions. There have been mass protests against the settlement in both countries, despite the damage of the twenty-year stand-off; for Macedonia until Greece ceases to veto a name, this newly independent neighbour cannot join the United Nations or the European Union (EU), something the new country is desperately keen to do after the turmoil of the Balkan wars. If this sounds just too remote to be relevant, pause and reflect on and compare Brexit in the UK at this same time.

How does this all connect with a possible LLL policy? Macedonia is on the EU list of Members-in-waiting. It provides such nations significant funds to reach benchmarks for EU membership. Macedonia for the past two years has been one such beneficiary generously supported by grants to develop an education system fit for EU Member standards. One element of this is a LLL policy and strategy, which looms large among EU criteria. With likely Greek–Macedonian détente, EU (and also NATO) membership suddenly come within reach, counterbalancing the worrying rise of Russian influence in the region. Thus, in the world of macro-politics, and following two national elections, what might never have entered the imagining becomes a possibility.

How do these political circumstances compare with the Australian policy and cultural environment of ALA? What external factors and internal events might conspire to make the remote look probable: a change of federal government for example, and strong profiling of SDGs as a subject vital to Australian as well as global good health? Do the writ of UNESCO and the OECD, along with those of other regional and global IGOs and even INGOs bodies carry force in Canberra? Or is the Australian environment one where grassroots lobbying, social media campaigning and street rallies carry more weight?

The EU engaged an intermediary in 2016–17 to support Macedonia to reach the required standard in policy and planning with respect to the LLL accession prerequisite. This occurred rather later in the piece (EU & FYROM, 2017b). Being a token afterthought is familiar if not comfortable to adult educators. The task of developing an LLL policy fell to Heribert Hinzen with myself. When it began, much time had been spent developing other more mainstream policy documents: one on technical education, another, oddly perhaps, for adult education, and for us most significantly, a central one for a Comprehensive Education Strategy (CES) for the whole education sector and system (EU & FYROM, 2017a). By the time we got to Skopje and got started, early drafts of these documents were all available. Some were already receiving their final revision and polish.

After testing the water and getting to know better what was done and what might be possible (Heribert was not new to the country but this was my first acquaintance), we lighted on what proved to be a well-judged gamble. Instead of focussing on a separate and stand-alone further, Lifelong Learning strategy we took up and deconstructed the CES. We showed how the philosophy, understanding and practice of LLL had to be woven and embedded into all levels and parts of the already familiar structure of life stages and school-based system. Rather than propose a separate and competitive structure for scarce resources, when in any event there would not be the resources to create another strand or slice even of formal education, we set about colonising, informing, enriching and re-channelling the efforts of the age-based elements already in place.

We made no bones about LLL needing resources, policy commitment and legislative underpinnings. But we took as the starting point that

all effort labelled education must be part of a national LLL system, with articulation between the elements and age stages. This at once moved the debate beyond arguing for small crumbs for the years after compulsory and formal education and training in college, workplace and university, to see the curriculum, resources and learning methods as part of a connected continuum. Instead of fighting to take funds off other sectors we were enriching what each established sector might and should aspire to achieve.

Lessons for championing LLL in Australia are obvious. If however by LLL we really do mean education and learning opportunities for adults, let us be honest in saying so, and win such arguments and allies as this strong and growing age-sectoral interest attracts. We will however risk being dragged back into familiar tired and unproductive clichés such as how valuable flower-arranging and creative writing for the elderly can be. There are very compelling arguments for supporting U3A and other provision for 'third- and fourth-agers' on all kinds of grounds, including, increasingly and compellingly, fiscal and economic (EU Education & Culture DG. Lifelong Learning Programme, 2014). If however we are to champion LLL rather than just some skill retraining for employment and some leisure-time learning activities to keep old people alert and active, we must play the full education field, not just a small-change tag-on sector.

An example in Macedonia was to unhitch the idea that 'non-formal' and 'informal' apply to adults, while formal is for little and bigger kids and young people. In giving strong support to early years as a vital high priority foundation for lifelong learning we pointed out that informal modes of learning play a major part in the early years; and indeed that these two other modes of learning needed recognising and supporting through all the formal stages of the education system.

Hinzen and I found the Macedonian project absorbing and challenging, a rich example of learning by immersion in doing. Let us consider a few points that may resonate with ALA ambition for #YOLL2018.

So far as time permitted we set out to meet and get to know as many of the key people as possible in relevant departments other instrumentalities of the government, and others in the NGO sector and universities. We held wider-reach one-day seminars in the capital Skopje and in a town far away from the capital. This is a small

relatively impoverished country, where local attitudes and histories differ, although it is a unitary country, not a federal system like in Australia. Influence-leaders and decision-makers tend to be accessible in Skopje. We made it our business to engage with the key Prime Minister's department, and not restrict ourselves to those in the box of administration called education or training.

We sought to throw discussion wide, and to connect what we were doing with the full gamut of social issues, not only the (economic) aims of education. Given the key role of the EU in our project, and in the country's aspiration for its future, we drew heavily on EU documents and arguments for a LLL strategy. At the same time we trod carefully around some narrowness in the EU policy position. Despite kind words about social issues this is heavily weighted to what is now called second generation LLL: the reductionist LLL education-and-training meaning adopted in the 1990s in place of the more visionary ambition of the UNESCO Faure and Delors reports (Faure 1972, Delors 1996). We looked for and sought to build on and build up the sadly neglected remnants of a quite robust system of local AE centres (people's universities) that had withered away after the Tito years.

The final meeting of the whole EU project for a Macedonian education system came together for adoption in November 2017. Whether the LLL Strategy grows roots, and flowers productively still remains to be seen. The auspices so far are good. With the change of government a more receptive air blew in and the Strategy went to Parliament where its reception was favourable. We then left the scene so did not remain to remind and cajole, nor are we ongoing stakeholders in the outcome. In these senses ALA is on firmer ground, so long as it gets it ideas and it words straight, and its campaign is well sustained.

The Macedonian intervention was one promising step in a tough environment: a case study of a small, new, somewhat embattled state struggling for national identity. It will take decades to establish the foundations for and fact of self-confidence so as to operate as a stable, secure and healthy democracy where people learn collectively and individually and their wise and collective voice is heard and heeded.

Australia is much further down that road after two centuries rather than decades, with a simpler and easier present and future – but no guarantee for that future. There are lessons here. Australia's failure still to come to

tenable terms with its indigenous people is an Achilles heel. Its relaxed attitude to the need for an well-informed and active citizenry, and a penchant for short-termism shared by most western democracies, show the distance there is to travel before it has a clear and viable identity, and with that maybe a firm clear lifelong learning strategy and system.

## How to get things done: Bringing about a change in national policy in Australia

### *Some key prerequisites*

A few focal points remind us what we should know and build from.

1. To win political interest and public support we should concentrate on issues vital to and felt to be important by many or most people: the things that really concern people; not just national and personal wealth, but security and confidence in their future; maybe family and neighbourhood more than national. Good health, the capacity to enjoy life with confidence and to see a good and stable future not haunted by threats from other people and, increasingly worrisome, from climate change and its already seen effects; these and other social issues to do with access and affordability to what most matters will command attention. These are not confined to economic matters to do with one's own and children's job security and future. They straddle the SDGs. Goal 4 alone is not enough.
2. ALA should embrace all seventeen SDGs and campaign to promotion the SDGs attaching the strong case for LLL. Insist that SDGs are about and for us all, not just an item in the overseas development portfolio for poor people in poorer countries. Rather than hone in on SDG4 take up also the other sixteen and campaign for these with the essential LLL kernel lodged at the heart of each.
3. LLL as the key to a successful education system will have stronger impact than a special plea for another sector added on to the existing and competing age- and function-focussed set: early years and pre-school; primary; secondary; tertiary or higher; and add-on adult education with its unresolved general or academic and vocational tension of job-skills and competencies versus civic know-how, self-confidence in identity, and public versus private provision. LLL can be promoted as a touchstone or 'impact indicator' for all aspects

of education, and more broadly of learning provision and support, throughout the curriculum in a full sense. Recognising that learning at all ages – 3, 13, 23 or 73 – uses what we call formal, non-formal and informal methods: this will assist school and college planning, assessment and quality assurance.

4. Education itself – even 'education and training' – is just another box in a world of policy and administrative boxes where special interests plead and compete. Reference is too often inward to the interests that manage and occupy the box. Universities are most exposed as self-seekers driven by individual and institutional ambitions rather than meeting community needs. For LLL to become a way of life it must avoid being trapped in a fact or perception of being self-serving. It is a delicate matter of judgement how to identity and justify a call for more resources for LLL as a specific new element across the age-based sectors of the education system. A new competitor alongside these will be seen as a call for more funds for AE; all too easily that becomes the leisure and pleasure mainly of retired mainly comfy-off articular middle class people.
5. We can still demand what is required for full recognition of the learning support needed (formal or direct or through other modes) for that much longer age sector of the population past the years of compulsory initial education: a golden triangle of policy, legislation and finance such as other sector age bands properly enjoy. One proposed Macedonian arrangement was for a national Lifelong Learning Council comprising a full spectrum of interested parties outside the education sector and with education members also on the Council. Such a device may work in one country but not in another.
6. Australia's demographic profile does not make ageing and the economic imbalance of the school–work–retirement phases as alarming as in many economies in Europe and East Asia; but it is a present or approaching issue here as elsewhere. Lobbying from this perspective proper, but it would be wise to do this from a wider perspective that questions the categories themselves and builds the case for LLL into this, also making gender assumptions central. What will we mean by work, and retirement, and by leisure and pleasure, in the AI near future? Why 'retire' and stop work, for some other life, at a set and even-gendered age that is either arbitrary or set by short-vision 'human

resource' economics? LLL can be championed as sitting at the centre of these big questions coming to Australia and all other societies, including especially the impact of robotics and other technological innovations changing the nature of work. How about taking up and promoting post-VET-only 'Third Generation Lifelong Learning'?

7. A fuller and richer understanding of LLL is needed. Global neoliberalism favours nice words but few deeds follow, since 'the market knows best'. The strength and cultural wealth of this most multicultural of countries, must be central. Australia must come to terms with its own past, including both bad and good in its abiding present, grasping the identity that gender-neutral mate-ship at its best implies. It means restarting and sustaining the start–stop process of reconciliation badly halted with the Government's blunt and discourteous rejection of the Uluru Statement (Pearson, 2017). For this sustained civic learning nation-wide is required, of the kind of experiential learning that over time led a narrowly nationalist-minded former Prime Minister to redefine Vietnamese boat refugees as his mates.
8. Pushing the SDGs is a good thing for Australia in any event. If LLL is riding that barrow its chances are better. If instead it rolls its own education sub-sector barrel its prospects are more dim. Ultimately it is about what identity and what future we subscribe to and want to work for Australia.

## Making it real and getting things done

ALA has set its sights on a national LLL policy. The role of national politics remains inescapable, despite its many failures of leadership and mixed performance. Australia's several states, and the federal government in particular, wield power and can enable, reject and ignore, calls for a 'national lifelong learning policy'. Aboriginal citizens are painfully aware of the power to ignore the work and the will of their people.

Populist causes are easily amplified by modern print and social media as well as Australian style broadcasting. Governments and the media are easily swayed by, embellish, and fear the more earthy, blunt and exciting events and subjects. Politics favour quick wins over long-term leadership that tackles tricky things like climate change. Educating an active and therefore troublesome citizenry is thankless and hard work.

But popular culture and folk memory are also resilient and strong: stronger in some ways because Australia is still a new young post-colonial country seeking identity. Gender-freed 'mate-ship' may seem trite, yet it could be the bedrock for the LLL culture change we seek, if words are well chosen and well understood. Indigenous culture is far from new; but it still sits outside mainstream culture and politics, an incomprehensible mystery kept on the margins. Tapping the deeper instincts of diverse communities for doing good, for doing well by others as well as oneself; uncovering and bringing together Australia's multitudinous communities to lobby politicians and administrations and pressure the federal government: ALA might formulate and test a clear mission to achieve this. Maybe take one each year of a community, place or sector is not getting a fair LLL go, and make that a task for the year.

This paper has given one example of how in a less privileged country adopting a LLL policy may prove to be attainable through top-down political-administrative action. Here it was by a combination of external and IGO influences and local will. The work of consultation and consensus-building might then have been shelved but an election and a lucky change of government gave it a fairer wind. With hard work and sympathetic administrative and intellectual local leaders a new policy may have been won. Sadly change at the top may equally have an opposite effect.

*Achieving a national LLL policy* is only one important form of action open to ALA however. Several other forms of action are open to move Australia towards becoming more of a learning society comprising learning organisations, communities, and individuals. Together they may create the shared impact that a single approach might not achieve.

*Local celebratory events.* Another form of action is local and highly participatory in mode, involving many people and creating local awareness and new energy. If well conducted this medium can be a powerful message. The celebratory and festival dimension of civic life brings together people in localities, maybe across culturally diverse communities cohabiting the same space, who learn to learn from one another while they enjoy partying together. Alan Tuckett, long-serving Director of NIACE England and Wales and co-creator of what became the global phenomenon of Adult Learners' Week, referred to these special convivial events as party-frock days. Today Cork in Ireland is a lighthouse example of such city-wide events.

*Learn with and from others*. A third idea: Australia and ALA are not alone. Many communities in many countries have the same desire to push national government towards a legally grounded LLL Policy. Another #YOLL2018 and ongoing project could be systematically to scan, sift and propagate examples of good practice elsewhere that might enrich those involved, moving the Victorian States and the nation toward LLL practice grounded in legally enforceable policy.

Not everything done well elsewhere would work well here. A 'not invented here' mentality however does not help us to learn and do better. If the old North does not seem alive and interesting, neighbouring Asia, especially economically and demographically advanced East Asia, may prove more fruitful. ALA's membership of a host of IGOs and INGOs, and its partnership with national civil society bodies around the world, also using the power to inform of the Internet, make this a rewarding quick-win task for a person or team who share and support ALA's purpose. A further step could be to borrow or share one new idea from abroad every year, road-test it, and assess its relevance and use in Australia.

*Not either–or:* There is no necessary dichotomy between lobbying government to make and change laws and doing good and fun things locally. One can showcase and advance the other. Local Members find it useful to show their faces at events, to demonstrate that they are themselves listening and learning.

*Make use of new tools*. Populism is easily amplified by the modern print and social media. But popular culture and folk memory are resilient and strong too, perhaps stronger in some ways because Australia is still a new and young country seeking its identity. Far from new, Indigenous culture sits outside mainstream culture and politics, an incomprehensible mystery kept at the margins. If the national adult learner body can inspire and mobilise all its members and all their communities to embrace, promote and model LLL it will release energy and voluntary civil society effort where governments cannot.

*Build on strong foundations*. Victoria, the current HQ of ALA, has a proud history of community action: witness the early Neighbourhood Centres and now the many Community Learning Centres, UIL-recognised 'Learning Cities', as well as a socially innovative record of Australian State administration that facilitates government–community collaboration.

Let us come back to the chameleon's core proposition for #YOLL2018. All of the above can contribute to creating a climate and a steady drip-drip of influence, using all available means, especially good news and tough luck stories and petitions on the social media. If governments are worked on and worn down, and if popularity seems to lie with LLL collaboration and action, an indifferent national environment may quickly look different.

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## About the author

***Chris Duke*** trained as a historian, educator and sociologist at the Universities of Cambridge and London. He has worked in UK, Australian and New Zealand universities as an adult/continuing educator and professor of LLL. Currently Secretary-General of PIMA, he has been a lifelong NGO networker and local activist. He writes frequently on practical and philosophical matters relevant to this article, as well as on the role and social responsibilities of higher education.

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**Book review**

# Freire and education[1]

Antonia Darder
New York: Routledge, 2015
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177 pp.

Reviewed by Cheryl Ryan
Deakin University

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The subject of the book is clear in the title, however, the book is not 'a systematic analysis of Paulo Freire's work' (p. ix), as one might first expect. Instead, it is the outcome of a personal, reflexive project – 'a critical intersubjectivity' – that is in essence an homage to Freire's writings (p. x). The purpose of the book is clear. It is a presentation of '… the ways in which Paulo Freire's work has personally had an influence on [Antonia's] life and [her] scholarship in education', and with a view to supporting 'young scholars' to appreciate that 'our lived histories and personal proclivities are seldom absent from the theorists we choose to follow or … those we disavow' (p. x). Antonia describes the influence on her scholarship, with reference to Freire's words, as 'ha[ving] deliberately entailed a tireless effort to transform 'the weaknesses of my

[1]This book is one in a series of books: Key ideas in education

powerlessness' into 'a force capable of announcing justice' (p. xi). With this in mind, one might substitute the word 'purpose' with 'mission' that extends beyond words and rhetoric to actions and enactment.

The contents are presented in four chapters: (1) Liberation: Our historical task; (2) Pedagogy of love: Embodying our humanity; (3) Conscientizaçao: Awakening critical consciousness; (4) Problematizing diversity: A dialogue with Paulo Freire; and Epilogue: Our struggle continues. Access to the dialogue with Freire (not previously published) is a unique feature of this book.

Freire's work in education is enduring; transcending time and discourses. His work has been described as not having 'an endpoint' but rather making 'a contribution to the long historical struggle for human emancipation' (p. xii). As I read the book, I could not help but think of, and lament, today's national and global politics and, as this book aptly highlights, the struggles in education and society that confront us today.

As strong as the temptation is to give a detailed synopsis of the rich and textured content, I must constrain myself and, instead, focus on the first three chapters that prompt us to think (or re-think) the meaning, purpose and practice of education. I had the pleasure of meeting Antonia Darder when she last visited Australia. She was engaging, compassionate, and her commitment to education that is emancipatory and transformative for individuals, communities and society was compelling. As I read what has influenced her thinking, practice and scholarship, I felt as if she was 'reading over [my] shoulder' (Jackson & Mazzei 2013, p. 265).

Themes in chapter one include: Education as a political act; Knowledge as historical process; The dialectical relationship; Schooling and capitalism; Betrayal of multiculturalism; The cultural context; Our unfinishedness. The first theme – the political nature of education – is the cornerstone for the other themes in this chapter. It's timely to be reminded that education is not a neutral concept or practice; instead, it is very much a political product (p. 7), driven by political, economic and ideological agendas (e.g. neoliberal priorities and capitalism) that construct education policies, discourses and practices. Integral to this, however, is the maintenance of a critical perspective and an agentic capacity to question what is and to enact 'resistance, and transformation' (p. 13) within and against education systems that promote passivity, compliance and present a façade of neutrality. Freire acknowledged the potential for 'educators [to] perpetuate political values, beliefs, myths and meanings about the world' (p. 8), and was concerned

about 'the hegemonic culture of schooling [that] socialises students to accept their particular role or place within the material order' (p. 8).

Another theme in chapter one concerns knowledge as a product of history, but also culture, and again, an awareness and critical understanding is needed of the ways in which history 'shape[s] our understanding of the world' but also how 'our collective responses to events also alter the course of history' (p. 15). We have much to reflect on today in our own society and the dominant discourses that shape how we perceive ourselves and our notions of difference and other. While it is important to be learning from past events, it is also important to work to change 'unjust conditions' that impact 'the needs of students and their communities' (p. 15). Integral to this is a capacity to comprehend and engage critically with situations or events which limit or constrain ('limit-situations') from a dialectical perspective of 'knowledge, history and the world' (p. 17). Antonia argues that we are 'more deeply mired in Western ethnocentric notions of humanity' (p. 35) and these are reflected in current education policies (e.g. curriculum, standardisation of knowledge) and the centrality of the individual that are antithetical to 'the legitimacy of subordinate cultural community values and epistemological traditions of difference … lead[ing] to the negation of the worldviews of those deemed 'other' (p. 35). This raises the importance of giving students opportunities 'to read their world, according to their authority of their lived histories and from there construct new knowledge' (p. 21). This requires teachers and educators to adopt a critical lens, pose questions, acknowledge tensions and conflicts, and to enable the production of new knowledge.

Chapter two comprises themes such as: Love as a political force; Solidarity and difference; Toward a humanizing education; The indispensability of the body. At first glance, the notion of love aligned to politics, education and pedagogy might seem a little unusual, however, love is understood 'as a motivational force' and the 'pedagogy of love' is integral to engendering 'emancipatory relationships' (p. 51). For Freire, love was conterminous with teaching, therefore, within the context of teaching and learning, 'love and respect for students' is the basis for an authentic engagement with students (p. 52). Antonia draws on Freire's words to describe a pedagogical encounter that enables students to 'engage in the experience of assuming themselves as social, historical, thinking, communicating, transformative, creative persons; dreamers of possible utopias, capable of being angry because of a capacity to love' (pp. 53–54).

Another dimension to the pedagogy of love is the relationship between 'love, the body and knowledge' (p. 66) and the indispensability of the body. Learning is an embodied experience, involving the interactive, relational and emotive dimensions (O'Loughlin, 2006). Such a notion of learning is at odds with the dominant discourses and practices that reinforce notions of 'classroom management and control' (p. 67) thereby disciplining the body, and yet, '[t]he material conditions and histories of our students are made visible on their bodies' (p. 68), giving insights to how students might see themselves, others, their world and their lived experiences. Disembodied practices erase the body from learning and are antithetical to a pedagogy of love.

Chapter three includes themes relating to: Concept of conscientizaçao; Problematization; Dialogue and conscientization; Indispensability of resistance; radicalization; The dynamic quality of consciousness; The educator and the emergence of consciousness. The concept of conscientizaçao is grounded in practices of 'critical consciousness and social transformation' (p. 80). Antonia summarises Freire's description of conscientizaçao or social consciousness as 'a dialectical process that develops and evolves, as we each contend, through theory and practice, with the actual social conditions we find before us and in relationship with others' with the view to eschewing that which limits and oppresses and instead to work towards an 'emancipatory consciousness' (p. 81). The end of this chapter brings us back to 'teaching as a personal and political process', one that requires teachers and educators to 'become clear of our own purpose so that we can take charge of our praxis' (p. 126).

This book achieves its stated purpose as a representation of the influence of Freire's work on Antonia Darder's life and scholarship. She writes with energy, conviction and clarity and with respect and love for Freire's work. As I mentioned earlier, I also see it having a mission; a call to action that is informed by critical consciousness and reflection because Freire's work has 'no endpoint', instead, his work provokes a sustained approach and response to education that is equitable and just.

## References

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