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## Chapter Two Learning Environments and Learning Concepts

Whenever we ask adults about their learning, they most often mention education and training programs sponsored by the workplace, colleges and universities, public schools, and other formal organizations. They first picture classrooms with “students” learning and “teachers” teaching in a highly structured format. Yet when we ask these same adults about what they have learned informally over the last year, they typically respond with descriptions of learning activities outside these formal settings. They discuss, for example, remodeling a house, which has involved everything from reading and talking with friends to conversations with carpenters, plumbers, and electricians. Or they may focus on an important change in their life, such as an illness, parenthood, or divorce, which has precipitated numerous learning events, sometimes over an extended period of time. In considering the spectrum of learning opportunities available to adults, it is important to acknowledge all of these arenas of learning, from the highly structured to the more informal ways adults go about learning.

Why is it important that educators of adults recognize that learning happens in so many and varied places in the lives of adults? First, appreciating and taking into consideration the prior knowledge and experience of learners has become a basic assumption of our practice as educators of adults, wherever this knowledge was learned. In working with welfare recipients, for example, instructors might recognize that parents on welfare have had to learn how to take care of their children on very constrained budgets, keep their families safe and healthy under difficult living conditions,

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and in general make do with very little. Rather than asking questions about how they have learned to do this successfully, what is focused on most often is their lack of formal education and skills training. Formal schooling and skills training are important, but so are the ways they have informally learned about life skills that have kept them and their families fed and clothed. Likewise, workshop leaders putting on staff development programs in schools might learn as much as possible about the background and experience of the teachers in that school and what their knowledge base is with respect to the content of the workshop. There is nothing that turns off teachers more in these programs than being treated as if they know very little about the subject matter, especially if they have been dealing with it on a daily basis.

Second, if educators helped learners recognize the many places and ways they have gone about learning in adulthood, more adults might see themselves as active learners. As a result, they might be less cautious about learning new things and even be more willing to enter formal programs of learning. One of our favorite stories is about a duck carver who was interviewed as part of a study on self-directed learning (**Berger, 1990**). This man, who considered himself both a nonreader and “definitely not a very good student,” taught himself how to carve ducks. He started this process by carving some ducks by himself and then taking them to duck carving shows, where he could talk with other artists about his initial attempts. In addition, he read every book he could get his hands on related to duck carving (and remember, he thought of himself as a nonreader). He now raises ducks so he can have live models, in itself another learning project. As a result of the interview process, this man saw himself as much more of a learner than he had before. Our hope is that as more individuals view themselves as active and competent learners, at least in some areas, they might be better able to address the many life challenges that come in adulthood, through both formal and informal learning modes.

In exploring the spectrum of learning opportunities in adulthood, we first discuss each of the primary arenas in which adult learning occurs: those sponsored by formal institutions, nonformal community-based learning activities, and learning that is more informal or self-directed in nature. We then explore online learning as a fourth site for learning, one that overlays

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formal, nonformal, and informal modes of learning. While there are other terms in use, we have chosen to use the term online learning because it is the most common term used to refer to learning through the use of computers anchored to communication networks. A second section of the chapter presents two related concepts—organizational learning and the learning organization. Finally, we end the chapter with a discussion of lifelong learning and the learning society.

## Where Learning Occurs

In this section we first present a framework for three types of settings in which learning occurs for adults: formal institutional settings, nonformal settings, and informal contexts. This framework is an adaptation of one proposed by Coombs (1985, 1989; Coombs, Prosser, & Ahmed, 1973), in which he classified lifelong learning according to these three broad categories. The biggest difference between their conceptualization and our framework is that we have added the concepts of self-directed learning (which is synonymous with Coombs's definition of informal learning) and indigenous forms of learning. Although we are aware of the problems of trying to divide the landscape of learning opportunities into three separate categories, we are assuming that all three categories are of equal importance in the adult learning enterprise. There will always be overlaps among the three, something that educators of adults can capitalize on when designing educational activities. Online learning is a fourth site of learning, one that spans formal, nonformal, and informal learning.

## Formal and Nonformal Settings

For most people, learning in adulthood brings to mind classroom settings and this is indeed what **Coombs (1985)** and Coombs, Prosser, and Ahmed (1973) had in mind with their classification of *formal education*. Formal education is highly institutionalized, bureaucratic, curriculum driven, and formally recognized with grades, diplomas, or certificates. It is “the institutional ladder that goes from preschool to graduate studies” (**Schugurensky, 2000, ¶ 2**) and thus can include “adult basic education programs that follow the prescribed curriculum and employ certified teachers” (**Schugurensky, 2000, ¶ 3**).

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Historically, formal education, whether it be in public schools or postsecondary institutions, has had as its primary mission to serve youth. In more recent years the populations of some of these institutions—such as many community colleges, vocational- technical institutes, and colleges and universities—have changed so dramatically that they are now reaching more adult learners than traditional-age students. In fact, nearly half of the students in postsecondary institutions are over the age of twenty-four (**Kasworm, Sandmann, & Sissel, 2000**). For formal settings, we envision adults sitting in a classroom, with an instructor, learning in a variety of ways, from formal lectures to small-group interactions. When we ask participants what they remember as positive about learning in formal settings, they often cite well-organized, knowledgeable, and caring instructors; participatory instructional methods and well-crafted lectures; relevant and useful materials; and respect for them as adults and learners. And, conversely, when we ask participants to recall some of their worst experiences, they talk about arrogant instructors who have no sense of them as people or learners, poorly delivered content whatever the method used, and poorly organized and irrelevant materials.

The term *nonformal education* has been used most often to describe organized learning opportunities *outside* the formal educational system. These offerings tend to be short-term, voluntary, and have few if any prerequisites. However, they typically have a curriculum and often a facilitator. Nonformal educational opportunities are usually local and community-based, such as those programs offered by museums, libraries, service clubs, religious and civic organizations; mass media is also classified as a nonformal delivery system. Some insights into these nonformal settings are revealed in Taylor's studies of educators working in the nonformal settings of state and local parks (**Taylor & Caldarelli, 2004**) and home improvement stores (**Taylor, 2005b**). Instructors in both settings emphasized the informality, compressed time, and hands-on, interactive nature of the learning in which the needs and interests of the participants are paramount in the encounter.

While nonformal adult education is outside the formal schooling or education system, three subtypes can be discerned, all of which are “reactions to the limitations or failures of formal education” (**Brennan, 1997**, p. 187). The first subtype proposed by

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**Brennan (1997)** is nonformal education as a *complement* to the formal system. Targeted are those who have dropped out of the formal system, or who, for whatever reason, failed to obtain basic skills such as literacy while in the system. Adult literacy classes offered by the local public library or community college would be an example of this type of nonformal education.

A second type of nonformal education Brennan terms *alternative* to the formal system. This includes traditional and indigenous education, which we discuss in more detail in the following section. Nonformal education can also be seen as a *supplement* to formal education. Supplemental nonformal education he sees as related to a response to national and global imperatives: "This type of NFE is required as a quick reaction to educational, social and economic needs because formal education is too slow in its response (if it does in fact decide to respond) to these needs" (p. 187). An example of nonformal education as supplemental might be National Issues Forums sponsored by the Kettering Foundation. These forums are held in local communities and focus on civic issues such as the health care crisis, immigration, terrorism, and so on (see [www.nifi.org](http://www.nifi.org)).

Nonformal education is also associated with international development programs designed to improve the living conditions of people in developing countries through community projects and training programs. These programs are typically sponsored by nongovernmental agencies (NGOs) and private voluntary agencies. Nonformal educational programs in developing countries (as well as some nonformal programs in the United States) are "expressly concerned with social inequities and often seek to raise the consciousness of participants towards social action" (**Merriam & Brockett, 1997**, p. 170).

Despite efforts to distinguish between formal and nonformal education, some adult learning opportunities that could be placed in this nonformal category often more closely resemble programs in formal educational institutions. **Coombs (1989)** himself identifies "homegrown hybrids" of formal and nonformal, such as programs for out-of-school youth, community learning centers, and so on. And in the United States, for example, how does one classify a corporate training center or a proprietary school? So does using this term *nonformal* have utility today? We believe that it does, both in terms of recognizing the many educational programs in

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developing nations as well as focusing on the community-based programs of adult learning in all environments that fit the parameters of less structure, more flexibility, and concern with social inequalities. In addition, another type of learning usually associated with nonformal education—indigenous learning—is again being recognized as an important form of learning. Therefore, in describing nonformal educational learning opportunities, we highlight two types of these opportunities: community-based adult learning programs and indigenous learning.

## ***Community-Based Learning***

Varied pictures come to mind when we talk about community-based learning opportunities. We see people gathered in churches, the community center, or the local library organizing to overcome a specific problem or issue they believe to be important in improving life in their community. These problems have ranged from addressing racial hatred and inequality to ensuring adequate housing and sanitary living conditions. Other images of community-based learning programs include men and women learning to read and write while at the same time gaining marketable job skills, adults learning CPR at the local Red Cross, farmers being introduced to new methods and crops as a way to build economic control over their lives, and spouses who batter being taught nonviolent ways of handling their anger and frustration.

One common goal of many of these programs is their focus on social action and change for the betterment of some part of the community. Educators who work in these programs believe that education and training can be a powerful tool in assisting learners to take control over their own lives. Sometimes these programs are not welcomed by the mainstream community, especially if one of their main purposes is to challenge the existing way of life, including the current social and economic structures of that community. Vivid examples include the worldwide human rights movement, the continuing struggle to eliminate poverty and hunger, community-based actions exposing hazardous waste dumps, and local attempts to end discriminatory practices based on race, class, gender, sexual orientation, and so on.

Working with adults in community-based learning settings has both its blessings and its curses. Flexibility in administration and

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programming is often recognized as its greatest benefit. Because these types of organizations “start small and are typically organized as freestanding organizations with fairly simple structures ..., they can often move relatively quickly to identify problems and develop programmatic solutions” (Hemphill, 1996, p. 21). This can translate into quicker response times, in terms of both developing funding proposals and getting resources to where they are needed. “New people can be brought in (or unfortunately let go more quickly) as needed. Curricula can be rapidly developed or revised. Teaching assignments can be quickly modified” (p. 22). Being able to move more quickly does mean that checks and balances must be in place to ensure both a focused program direction based on community needs and quality learning opportunities that are useful. In addition, people attracted to work in community-based adult learning programs, whether paid or volunteer staff, often come with a passion for a cause that gives them the drive to stay with this work, even under the most trying conditions. On the downside, the very nature of many community-based organizations often puts them on the path to an unending search for resources. This continuing search for and worry about resources, in combination with long and often difficult working conditions, can lead to staff burnout very quickly, even for the most committed individuals.

## ***Indigenous Learning***

*Indigenous learning* is learning linked with a culture. It refers to processes and structures people in particular societies have used to learn about their culture throughout their history (Graveline, 2005). Conscious use of indigenous forms of learning, which are often steeped in oral traditions and art forms, can enhance nonformal and perhaps even formal educational programs. Storytelling, for example, is often used by African-American women to teach about the joys and sorrows of life. When teaching these women, instructors could incorporate storytelling as an important method of learning about the topic at hand, from surviving in modern-day organizations to basic literacy skills. In another example, Hicks and Rowel (2004) studied the nonformal indigenous learning of six public housing community leaders who were inspirational in helping others in their community. These women were effective

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in helping others by modeling exemplary leadership, practicing what they preached, and communicating with diverse groups.

Descriptions of indigenous forms of learning can be found in both scholarly and more popular literature (see **Chapter Nine**). **Cajete (1994)** eloquently describes the tribal foundations of American Indian education, which he sees as “shared by Indigenous cultures of the world” (p. 33). In tracing these foundations, Cajete observes:

We are tracking the earliest sources of human teaching and learning. These foundations teach us that learning is a subjective experience tied to a place environmentally, socially, and spiritually. Tribal teaching and learning were intertwined with the daily lives of both teacher and learner. Tribal education was a natural outcome of living in close communion with each other and the natural environment. The living place, the learner's extended family, the clan and tribe provided the context and source for teaching. ... Informality characterized the greater part of American Indian teaching and learning. ... However, formal learning was usually required in the transfer of sacred knowledge.

Hahoh is a Tewa word sometimes used to connote the process of learning. Its closest English translation is to “breathe in.” Hahoh is a sacred metaphor describing the perception of traditional Tribal teaching—a process of breathing in—that was creatively and ingeniously applied by all tribes. ... Through these methods [such as storytelling, dreaming, tutoring, and artistic creation], the integration of inner and outer realities of learners and teachers were fully honored, and the complementary educational processes of both realities were fully engaged. [**Cajete, 1994**, pp. 33–34]

Cajete beautifully expresses what teaching and learning mean to him: “A parable that often flashes through my memory during times of quiet, deep relaxation, or just before I fall asleep: ‘It is an essential, life-sharing act of each generation of a People to nurture that which has given them Life and to preserve for future generations the guiding stories of their collective journey to find life’” (1994, p. 187).

Brennan (1997, p. 191) has observed that “the lack of attention to the indigenous learning structure may have been initially the work of missionaries who viewed indigenous culture as inferior

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and non-Christian and therefore to be ignored or if necessary repressed.” He goes on to suggest a four-stage process for recognizing indigenous learning as an essential part of the nonformal system of learning for adults. In Stage 1, approaches or techniques that may be relevant to educational or developmental activities are identified—for example, the role of traditional dance and music and the use of legends, myths, tales, and proverbs. Stage 2 involves classifying these approaches and techniques into a system that educators in more formal settings can understand and integrate into their own ways of thinking. “The third stage,” he writes, “is associated with advocacy for the exploration of a broader indigenous learning ‘system’ ... [and] the fourth stage is represented by the development of more detailed and comprehensive learning ‘systems’ for a particular cultural group” (pp. 192–193). Indigenous forms of learning could also be seen as informal or self-directed learning, as was described by Cajete and is examined in the next section.

## Informal Learning

*Informal learning* is the third form of learning in Coombs's typology. Defined by him as “the spontaneous, unstructured learning that goes on daily in the home and neighborhood, behind the school and on the playing field, in the workplace, marketplace, library and museum, and through the various mass media” informal learning is by far the most prevalent form of adult learning (Coombs, 1985, p. 92). Illeris (2004a) calls this type of learning “everyday learning” because it “takes place in all the private and non-organised contexts of everyday life” (p. 151). It is, as Livingstone (2001) points out, learning that takes place without the externally imposed curriculum of either formal or nonformal educative programs.

The very nature of informal learning is what makes it so difficult for adults to recognize. Embedded as it is in our everyday activities, whether we are at work, at home, or in the community, and lacking institutional sponsorship, adults rarely label these activities as learning. However, studies of informal learning, especially those asking about adults' self-directed learning projects, reveal that upwards of 90 percent of adults are engaged in hundreds of hours of informal learning (see **Chapter Five**). It has also been

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estimated that the great majority (upwards of 70 percent) of learning in the workplace is informal (Kim, Collins Hagedorn, Williamson, & Chapman, 2004), although billions of dollars each year are spent by business and industry on formal training programs.

Informal learning, Schugurensky (2000) suggests, has its own internal forms that are important to distinguish in studying the phenomenon. He proposes three forms: self-directed learning, incidental learning, and socialization, or tacit learning. These differ among themselves in terms of intentionality and awareness at the time of the learning experience. Self-directed learning, for example, is intentional and conscious; incidental learning, which Marsick and Watkins (1990) describe as an accidental by-product of doing something else, is unintentional but “after the experience she or he becomes aware that some learning has taken place” (p. 4); and finally, socialization or tacit learning is neither intentional nor conscious (although we can become aware of this learning later through “retrospective recognition”) (Marsick & Watkins, 1990, p. 6).

Of the three forms of informal learning, self-directed learning is the most visible and the most studied (see Chapter Five). The following two scenarios illustrate the informal nature of self-directed learning:

*Scenario 1:* Charlie has a passion for model railroading. He spends hours in his basement planning his layout, tinkering with his equipment, and laying track. He subscribes to every railroad magazine published and talks shop with acquaintances who also have model trains. Every once in a while, he attends a model railroad show, but for the most part, this is a hobby he enjoys pursuing on his own. Over the years he has learned a great deal about model railroading and is proud of his layout, though as he says, “I’ll never be totally satisfied. There are always new things coming out which I like to fiddle with.”

*Scenario 2:* Trudy has just learned that she has breast cancer. Once over the initial shock, she decides to take an active role in planning her treatment. So that she can speak intelligently with the myriad medical personnel she knows she must face, she gathers as much information as she can about the disease from a number of sources, including the American Cancer Society, her local Reach for Recovery Program, the Internet, and an oncology nurse

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who is a friend of a friend. Moreover, she learns of a local support group for cancer patients and decides to join for both information and emotional solace, thereby choosing a nonformal learning opportunity as part of her own self-directed efforts. Her husband and best friend have joined her in her fight, and both are reaching out to a number of different sources for advice and counsel.

These scenarios, representing the independent pursuit of learning in natural settings, with or without the support of institutional resources, are very common in adult life. Yet even with the many verification studies that have been completed, self-directed learning in this form is not recognized by many adults, or even by some educators of adults, as “real learning.” There are a lot of Charlies out there, learning all kinds of things on their own, from model railroading to making quilts and crafting clay pots. Some find friends or independent mentors to assist them in their learning, and some deliberately choose institutional resources that might be helpful to them as part of their self-directed activities. There are also numerous Trudys whose self-directed learning activities “arise from and seek to resolve a problem or situation” (Candy, 1991, p. 199). These learners often combine resources in their natural environments with those supplied by institutions, from educational materials to people who can assist them with their learning. What becomes evident is that this type of informal learning does not necessarily mean learning alone, a major myth about self-directed learning (Brockett, 1994). Rather, adults often use other people, and even groups, whether they are institutionally based or not, in their self-directed learning pursuits.

Schugurensky (2000) makes just this point in summarizing the three forms of informal learning—that is, informal learning can occur individually or in groups and “learners can use a variety of sources for their learning, including books, newspapers, TV, the Internet, museums, schools, universities, friends, relatives, their own experience, etc.” (¶ 20). He also notes that informal learning can complement and reinforce or *contradict* learning acquired in formal and nonformal settings:

For instance, one can learn in school curriculum that the capitalist system is a great contribution to humanity, and learn through informal ways that such a system is detrimental to humanity. Likewise,

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one can be socialized by the surrounding community into a bigot, and learn virtues of tolerance in the public school. Moreover, one can go to a school and be aware that through the formal curriculum she or he is learning A (e.g. math), without being aware that through the hidden curriculum she or he is learning B (e.g. homophobia). [¶ 23]

Schugurensky also makes the point that informal learning can be additive, in the sense of acquiring more knowledge or skills, and it can be transformative (see **Chapter Six**).

In summary, we have presented a framework that encompasses three types of settings or contexts in which learning in adulthood occurs. The first two settings, formal and nonformal, involve some form of organizational or community sponsorship. The third opportunity, informal learning, is more of a hybrid. Although the majority of learning opportunities in this last category are planned and initiated primarily by learners in natural settings (such as the home, on the job, or through recreational pursuits), the learning processes and methods used in self-directed and informal learning have been incorporated by some formal and nonformal settings in the way they carry through their instructional programs.

## Online Learning

In more recent years, as the use of technology has increased in the delivery of learning programs, our picture of learning in formal settings has expanded dramatically. We now see learners doing individualized or group learning in computer labs, participating in interactive teleconferences, and interacting from their homes with fellow participants and instructors via the Internet.

And while most of the research and theorizing about online learning is occurring in the formal education sector, online learning is also going on in nonformal settings. Many businesses have their own intranet, where employees have access to company policies, events, and activities as well as learning that can be shared through chat rooms and e-mail. Local communities often use the Internet to stimulate citizen participation, and nonformal educational institutions such as museums facilitate learning through online activities. After getting a traffic ticket, one can even take a

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traffic school course online, endorsed by traffic court, to avoid getting “points” on one's driving record! And in a fascinating study of online social action, **Hollenbeck (2005)** explored how three online communities organized and educated their members worldwide in the art of social protest. She studied anti-McDonald's, anti-Wal-Mart, and anti-Starbucks communities, which she labeled *antibrand* communities. All three had formed for the purpose of educating others “by providing resources for getting involved and taking action” against capitalist corporate giants (p. 207). These antibrand online groups organized e-mail campaigns protesting corporate policies, publicized and supported local protests, and offered a space for employees who were overworked and underpaid to “vent” (a number of people in these online communities were disgruntled employees of the organization in question).

Informal learning has also been affected by this technology. How many of us have been curious about something and done a Web search to learn more about it? Even older adults are accessing the Web for up-to-date information on many aspects of their lives—from travel, to the “best places to live,” to their health condition (**Valente, 2005**). **Hayes (2005)** has also demonstrated how sophisticated one's learning can become through participating in the virtual world of video and role-playing games. She observed, for example, that since some of these virtual worlds are “not solely text-based, these worlds offer opportunities for learning through a wider range of modalities, including visual, auditory, and even kinesthetic modes, and rely less on verbal (i.e., reading and writing) skills for participation. These varied modalities may encourage or require different forms of identity construction, meaning-making, and social interaction” (p. 194).

As we noted earlier, it is from the formal education sector that we have learned the most about online learning, and it is to developments in this arena that we now turn. Online learning is a form of distance education, which has a long history of serving adults who otherwise would not have access to continuing and higher education. The defining characteristic of all forms and generations of distance education is the separation of student and teacher in time or space. What in the literature is often termed *first-generation distance education* consisted of print-based correspondence courses, a form still in existence. How many generations follow differs by

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author, but the simplest model has the second generation being broadcast and television technologies, followed by the third generation of information technologies of which Web-based courses are a part (**Moore & Kearsley, 1996**). This generation is distinguished by “an increased degree of learner control and flexibility, interactive communication and group-oriented processes” (**Conrad, 2005**, p. 445).

The phenomenal growth of online learning is reflected in some statistics that will be outdated before this book is published. **Internet World Stats (2005)** has estimated that there are more than 223 million Internet users in North America, or 68 percent of the population. Furthermore, 81 percent of higher education institutions in the United States offered at least one fully online or blended course in 2002–03, and over 1.9 million students were studying online in fall 2003 (**Allen & Seaman, 2004**). According to **Moore (2001)**, those who are enrolled in online courses tend to be women, older rather than young adults, and people employed outside the home.

As online learning has become almost commonplace in higher education, research has shifted from its technical aspects and its staying power to more pedagogical concerns encompassing “all aspects of the learning transaction, including its very important social dimension and its sub-parts, community and social presence; culture and facilitation styles; and theory-building” (**Conrad, 2005**, p. 445). At the same time, there are overarching concerns about this forum for learning. One big concern is with access, what some are characterizing as the *digital divide*. Distance education began in the nineteenth century to serve those who had little or no access to the traditional education system. While online learning is also designed to open up access, and does so for thousands of adults who need the flexibility of time and space for their learning, it may also be widening the gap between the haves and the have-nots:

To access the new forms of distance education, obviously you have to have access to the new technology, and richer people have that and poorer people do not have that. In the United States, high-income households are twenty times more likely to have access to the Internet than low-income families. In the United States, two-thirds of college-educated people have access to the Internet and only 6% of those with primary or elementary education. [**Moore, 2001**, ¶ 25]

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From a global perspective, it is estimated that of the world's 6.4 billion people, only 14.6 percent are Internet users (**Internet World Stats, 2005**). But the digital divide is not a matter of access alone. In a study of rural learners who had access to computers in community settings, **Page (2005)** found that other sociocultural and psychological factors impeded their use. Factors such as “uncertainty about change, fear of technology, need for guidance, inexperience, relevance, the social context of the persistently impoverished county, and the perceived need” revealed the complexity of the digital divide (p. 334).

There are other issues of concern to adult educators when considering the growth of online learning. **Moore (2001)** and others talk about the commercialization of Internet education. A number of private, for-profit institutions have sprung up promising learning anytime, anywhere, for anyone. But the promise of convenience and ease (for a price) may fool some students in terms of the commitment involved and the independent learning skills needed. Or, these institutions may have poor quality courses if instructors at the institution do not live up to its advertising. Private, for-profit Phoenix University, which is a largely online university, now has two hundred thousand students and expects to serve five hundred thousand by 2010 (**Selingo, 2005**), yet little is known about student success or lack of success in such a fast-growing institution.

In an analysis of the rhetoric of online learning, **Kelland (2005)** critiques three themes that characterize the promotion of online learning. The first theme, which she calls a myth, is that online learning is inclusive and democratic. In promoting online learning to disadvantaged groups (who, as we saw earlier, do not have the cultural capital to take advantage of it), governments and institutions “continue to ignore barriers that discourage, and even prevent, disadvantaged learners from participating in on-campus programs” (p. 254). The second theme, that online learning is accessible and flexible, is countered by the digital divide that characterizes even Western countries such as the United States. The third theme, that online learning is cost-effective, does not necessarily mean that lower institutional costs are passed on to students; further, students in industrial countries have trouble getting financial aid for their distance learning.

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In summary, online learning presents both opportunities and challenges to adult educators. As we have seen, online learning occurs in formal, nonformal, and informal settings. What we as adult educators need to think about is how the Internet is facilitating adult learning in all three settings and how we can maximize its potential. At the same time, online learning presents challenges particularly with regard to access, even in the information-rich, technologically advanced United States. Access issues, which are discussed more fully in the next chapter on participation, have haunted the field of adult education since its inception. It appears that online learning is yet another manifestation of this worrisome social issue at the heart of our adult education practice.

## Organizational Learning and the Learning Organization

The concepts of organizational learning and the learning organization are so interrelated that it is difficult to speak of one without reference to the other. Illeris (2004a, p. 88) concurs, stating that “there is no clear distinction” between the two “except for the discussion on what exactly it means that an organization learns.” Indeed, sections on the learning organization and organizational learning in the recent *International Encyclopedia of Adult Education* (English, 2005b) position each term with reference to the other. Recognizing the embeddedness of one concept in the other, we begin with a discussion of organizational learning, a concept that preceded that of the learning organization.

Learning has always gone on in organizations. At least since the industrial revolution, employees have had to be trained in the technical skills needed for their jobs. This learning, or more precisely, training, was “removed from the immediate work environment on which it [was] expected to have an impact” through the “‘transfer’ of skills and understanding back to the milieu” (Laiken, 2001, p. 6). As much of this training failed to transfer, and as organizations entered a more competitive environment, broader thinking about learning in organizations emerged. Argyris and Schön's 1978 book, *Organizational Learning: A Theory of Action Perspective*, defined the concept of organizational learning. As described by them, “Organizational learning occurs when members of the organization

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act as learning agents of the organization, responding to changes in the internal and external environments of the organization by detecting and correcting errors in organizational theory-in-use, and embedding the results of their enquiry in private images and shared maps of organization" (p. 16). A number of key points about organizational learning are present in this definition. First, it is individuals who do the learning, but in service to the organization, so that the organization can adapt and develop in response to the environment. Second, theories-in-use versus "espoused theories" (what people do versus what they say they do) form the basis for practice. Finally, this learning must become "embedded in the images of organization held in its members' minds and/or in the ... artifacts (the maps, memories, and programs) embedded in the organizational environment" (Argyris & Schön, 1996, p. 16).

As it has evolved, organizational learning is a flexible concept spanning a number of disciplines and perspectives so that it is now "impossible to capture with a single definition" (Fenwick, 2005b, p. 446). Further, the field of organizational development (OD) and the idea of knowledge management (KM) intersect with organizational learning in terms of how to incorporate learning into changing an organization's practices and culture, and how to employ the knowledge generated through individual and group learning. Today, all organizations are grappling with issues that include "generating innovation, integrating new technologies, improving existing processes, predicting and adapting to turbulent conditions, restructuring staff, improving performance, ensuring equitable opportunity, and fostering quality of work" (Fenwick, 2005b, p. 448).

Although learning has always gone on in organizations, it was not until the publication in 1990 of Peter Senge's book *The Fifth Discipline: The Art and Practice of the Learning Organization* that the notion of the learning organization became a popular concept capturing the imagination of organizations worldwide. Senge defined it as "a place where people continually expand their capacity to create the results they truly desire, where new and expansive patterns of thinking are nurtured, where collective aspiration is set free, and where people are continually learning how to act together" (p. 3). Implicit in this definition is the recognition that the learning organization is a vibrant, *social* entity;

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further, individuals learning in conjunction with each other has a synergistic effect—the overall learning is greater than a single individual's.

It is Senge's contention that “organizations learn only through individuals who learn” (p. 140). This is a necessary but not sufficient condition for creating a learning organization. There are also five core disciplines, or “component technologies,” that individuals must adopt for the learning organization to become a reality. Senge views *systems thinking* as the cornerstone of the learning organization. He believes that it is critical for people to shift their thinking from “seeing parts to seeing wholes, from seeing people as helpless reactors to seeing them as active participants in their reality, from reacting to the present to creating the future” (p. 69). Without this shift in thinking, he views the other four disciplines (developing personal mastery, changing mental models, building shared vision, and participating in team learning) as useless.

Watkins and Marsick's (1993) view of the learning organization is a bit broader. They see the learning not just with individuals but also taking place in “teams, the organization, and even in the communities with which the organizations interact. Learning is a continuous, strategically used process—integrated with, and running parallel to [the] work [of the organization]” (p. 8). Watkins and Marsick have outlined six *action imperatives* needed to create and sustain learning organizations. The first imperative is to create continuous learning opportunities at all levels of the organization. These opportunities range from on-the-job learning experiences to hosting global dialogue teams, with the goal that learning becomes an integral part of the everyday work life. To promote this continuous learning, two other action imperatives are brought into play: inquiry and dialogue, and collaboration and team learning. These learning strategies seem to form the heart of most organizational learning efforts, with the emphasis on the collective and interdependent nature of these processes. The fourth imperative, establishing systems to capture and share learning, involves “building organizational capacity for new thinking that is then embedded and shared with others” (Watkins & Marsick, 1993, p. 15). This fourth imperative, along with the fifth—empowering people toward a collective vision—mirrors Senge's disciplines of changing one's mental models and building shared vision. The final imperative,

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connecting the organization to its environment, acknowledges the connections between the organization and its external constituents, including its customers and the various local, national, and international communities that affect the work of the organization. These connections are symbiotic. It is not only the external constituents that affect the organization; the organization also affects these external groups.

This learning capability improves an organization's capacity to respond quickly and in novel ways, thus increasing its ability to foster innovation and change. Organizations with this ability to make rapid changes may have a competitive advantage in the marketplace, although there is little research that actually confirms this claim. In one of the few research studies to test this assumption, Ellinger, Ellinger, Yang, and Howton (2002) correlated results of a learning organizational questionnaire with objective measures of 208 U.S. manufacturing firms' financial performance. While they caution that this study was exploratory, they did find positive associations between the learning organization concept and firm performance.

Today the learning organization goes by a number of names including *adaptive*, *resilient*, and *innovative* organizations (Marsick & Watkins, 2005). However it is conceptualized, there are some consistent features of a "healthy" learning organization. These include: "(a) openness across boundaries, including an emphasis on environmental scanning, collaboration, and competitor benchmarking; (b) resilience or the adaptability of people and systems to respond to change; (c) knowledge/expertise creation and sharing; and (d) a culture, systems and structures that capture learning and reward innovation" (p. 357).

In thinking about the process of building and sustaining learning organizations, Dixon (1997) offers the metaphor of the hallway as a useful analogy. She defines hallways as "places where collective meaning is made—in other words, meaning is not just exchanged, it is constructed in the dialogue between organizational members" (p. 25). Although the dissemination of complete and accurate information is needed to enable this process to work, it is not sufficient to promote shared meanings among people. Dixon contrasts this accessible meaning of the hallways to that of private meaning, which is knowledge known only to individuals and not accessible to others. Collective meanings of organizational

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members are held in what she terms the organization's storeroom. This collective meaning, which includes norms, strategies, and assumptions about how the organization functions, is the glue that holds the organization together. She acknowledges that this collective meaning, if not allowed to be questioned, can have a negative impact on organizations' being able to learn and change.

Finally, Dixon outlines seven critical elements that characterize hallway learning: (1) reliance on discussion, not speeches; (2) egalitarian participation; (3) encouragement of multiple perspectives; (4) nonexpert-based dialogue; (5) use of a participant-generated database; (6) the creating of shared experiences; and (7) the creation of unpredictable outcomes. We find the last element especially intriguing; it asks those of us who choose to create learning organizations to move away from the predictable aspects of learning and into the realm of reframing problems in unexpected ways and finding possibilities never thought of before.

There are, of course, numerous barriers or inhibitors to creating learning organizations. Among the most critical are the inability of organizational members to recognize and change their existing mental models, the lingering power of individualism in organizations versus the spirit of collaboration and team learning, the lack of skills and developmental readiness by people to undertake "systemwide learning," and "truncated learning or the ghosts of learning efforts that took root because they were interrupted or only partially implemented" (Watkins & Marsick, 1993, p. 240). Another major barrier to creating learning organizations is that power is often in the hands of a few who may or may not buy into these ways of working and thinking (Cervero & Wilson, 2005).

As we have just seen, it is not possible to talk of the learning organization without reference to organizational learning. We believe that the concepts of organizational learning and the learning organization offer a way of working and thinking for educators in both formal and nonformal settings. It allows us to move beyond planning just for individuals and groups of learners in terms of affecting both learning processes and outcomes. Creating learning organizations, whether we are associated with educational, quasi-educational, or noneducational institutions, provides a way to foster learning communities that are open to change and innovative practices.

## Lifelong Learning and the Learning Society

In recent years nearly all people, and especially those of us in education, have heard the terms *lifelong learning* and *learning society*. But what do we mean by these terms and what do they mean for the field of adult education and adult learners in particular? Are they a convenient slogan to promote our field? Will their use result in more adults having access to learning opportunities? There are, of course, no simple answers to these questions. What we can do in this section is explore these concepts and in particular the issues they raise with regard to practice.

Before lifelong learning there was lifelong education, promoted chiefly by UNESCO in the 1960s and 1970s. The now-famous UNESCO report, *Learning to Be* (Faure et al., 1972), was seen as a blueprint for reforming the entire educational system. Both idealistic in its goals and humanistic in its concern with individual growth through learning, lifelong education, it was hoped, “would result in the creation of a learning society where access to and learning in education would be taken for granted—an inalienable human right like clean water or a roof over one's head” (Boshier, 2005, p. 373).

However, as societies became more conscious of the need to develop a skilled workforce to be competitive in the marketplace, the humanistic focus of lifelong education gave way to more of an economic framing of lifelong learning. By the early 1990s the term *learning* had supplanted *education*. This shift was also marked by a significant publication, this time from the Organization for Economic Cooperation and Development (OECD) in 1996, titled *Learning for All*. It is significant that the OECD represents the economic interests of mostly affluent countries, for this report established “the political-economic *ideology* of lifelong learning (Illeris, 2004a, p. 29). Secondary to the economic focus, this report also acknowledged the importance of lifelong learning for personal development and social unity: “We are all convinced of the crucial importance of learning throughout life for enriching personal lives, fostering economic growth and maintaining social cohesion” (OECD, 1996, p. 21).

Most recently the OECD conceptualization of lifelong learning has been augmented by reports from the European Union and

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the World Bank. The 2000 report of the Commission of the European Communities acknowledges that learning need not be so highly institutionalized, highlighting the importance of nonformal and informal learning contexts. The report maintains the economic aim of lifelong learning, but also says an "equally important aim" is promoting active citizenship. The World Bank's report on lifelong learning, while including Third World and transitional economies, states the aim of lifelong learning to be the creation of a workforce "able to compete in the global economy" (World Bank, 2003, p. xviii).

Although in the United States use of the concept of lifelong learning has lagged behind other countries, we have our own report urging the nation to make adoption of a system of lifelong learning a national priority (Commission for a Nation of Lifelong Learners, 1997). The five recommendations of this report are to "acknowledge the link between lifelong learning and global economic success, establish equity of access, incorporate new technologies in lifelong learning, rethink and reorganize educational delivery, and make resource commitments commensurate with lifelong learning's importance" (Maehl, 2000, p. 7)

Lifelong learning, at least in the United States today, is more a "principle or organizing concept than a functioning system" (Maehl, 2000, p. 4). This is partly because of the decentralization of our educational system and the myriad institutions, agencies, and programs that offer learning opportunities. There is no public policy on lifelong learning and certainly no unified funding source. The result is that the concept is shaped by whatever entities take it up. Postsecondary education, for example, seems to be in the forefront in shaping lifelong learning as access to higher education for adults of any age and stage in life. The Department of Labor, in contrast, sees lifelong learning as access to training to develop skills needed in the workforce.

The proliferation of interpretations of lifelong learning has led to some vigorous debate and discussion about its merits and limitations. The most vociferous critique of lifelong learning is that it is a tool for restricting its application to "labor market expectations that enable governments and corporations to exploit the idea of human capital" (Dale, Glowacki-Dudka, & Hyslop-Margison, 2005, p. 113). Or, because lifelong learning is so pervasive

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throughout society, knowledge becomes a commodity that is produced, packaged, and sold to the consumer. Crass commercialization begins to define lifelong learning. Yet, the notion of lifelong learning has also opened up our thinking of learning as broader than what goes on in school. Nonformal, informal, and self-directed learning are much more visible as legitimate sites for learning.

The most vexing issue, one raised earlier with regard to online learning, is the question of access. As Boshier (2005, p. 376) points out, “[L]ifelong learning is used as a rationale for inflicting (often oppressive and authoritarian) forms of mandatory continuing education on citizens already marginalized and experiencing social difficulties.” **Illeris (2004a)** notes that while all the international reports “are quite explicit about the necessity of giving priority to those who are poorest in economic, social, and educational terms,” he wonders if in reality this is happening “in a way that is relevant seen from the life situation and perspectives of these participants” (p. 34). Finally, **Holford and Jarvis (2000)** raise the fundamental question of who benefits in the learning society, pointing out that the rhetoric and the reality do not match. For example, life-long learning with regard to the workplace “will emphasize types of learning and knowledge that make sense in concrete contexts and will be widely available. Unfortunately—whatever the potential benefits to all of privileging practical knowledge—access to learning opportunities at work remains highly unequal” (p. 655).

Despite the issues involved in a society such as ours promoting the notion of lifelong learning, the concept does seem to have some usefulness in conveying the wide variety of learning activities and sites where it can occur. It also reflects what some see as the “postmodern” condition, full of change and opportunity. As **Edwards and Usher (2000)** write, “[C]hange and uncertainty require lifelong learning and ‘lifelong learning’ is itself a signifier of the uncertainty and change of the contemporary” (p. 99).

This notion of change and uncertainty also underlies the concept of the learning society. Just as the learning organization is designed to respond to environmental and economic developments, the learning society acts in response to social change: “The more prevalent or profound the changes that occur in a society, the greater the likelihood that it will be regarded as a learning society” (**Jarvis, 2004**, p. 15). China is a prime example. Undergoing

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enormous change, the Sixteenth Congress of the Chinese Communist Party in 2002 declared China's intention to promote lifelong learning and create a learning society. To bring about this learning society, the government has set up and is supporting sixty-one experimental learning communities throughout the nation. Using the present administrative infrastructure, which links provinces, municipalities, districts, streets, and neighborhoods, these communities are engaging people of all ages in nonformal and informal learning activities designed to bring learning to the fore as a priority in their lives and in their communities. Local governments in the experiment areas have integrated the work of building the learning community into their administrative responsibilities; learning streets and learning families in these local learning communities attest to the scope of these efforts (Bo Chang, personal communication, September 7, 2005).

The magnitude of China's efforts to create a learning society makes the concept difficult to grasp. It is perhaps easier to think in terms of learning "regions" or learning communities, cities, towns, or villages. Learning regions, according to **Walters (2005)**, refer to a geographic area of any size that has made a commitment to linking "lifelong learning with economic development to compete globally" (p. 360). The important characteristics of learning regions such as a city, state, or province is that all forms of learning—informal, nonformal, and formal—are promoted for all ages. As **Boshier (2005)** explains:

In a learning city (town or village) there are attempts to foster all forms of learning for citizens old and young in many contexts. ... Learning cities are committed to learning as a core aspect of development. As well as catching dogs and servicing sewers, the city fosters learning. They seek to sustain economic activity by building social capital. ... A learning city (town or village) is: a form of community development in which local people from every community sector act together to enhance the social, economic, cultural and environmental conditions of their community. [pp. 376–377]

Boshier also includes learning festivals as part of the learning society. Such learning festivals are part learning, part cultural expression, and part entertainment. What is key to learning

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regions, cities, or festivals is not technology, which "helps but is not essential. What matters most are local places and spaces" (Boshier, 2005, p. 376).

The learning society then can be considered as an expression of lifelong learning, one that is place-bound. What it means to be a learning society (or learning city, community, or region) will differ according to the particular society. What does the learning society look like, for example, in "middle-income countries like Brazil, India and South Africa" or "in contexts of widespread poverty and social polarization" (Walters, 2005, p. 360)? Certainly, this concept of the learning society, along with the concept of lifelong learning, will undergo change as societies grapple with implementing learning for all across all segments of society.

## Summary

Learning opportunities for adults are found in a variety of settings, from formal institutions to one's home or place of employment. The importance of understanding this vast array of learning opportunities for adults is twofold. First, acknowledging prior knowledge and experiences of learners, wherever gained, is important to the practice of adult educators. Second, if more than just formal types of adult education are made visible, individual learners, even those without formal schooling, may be better able to recognize their abilities and skills as lifelong learners.

There are three primary types of opportunities or sites in which learning occurs for adults: formal settings, nonformal settings, and informal or self-directed contexts. A fourth site explored in this chapter is online learning, which spans formal, nonformal, and informal settings. Although the categorization of these learning opportunities and the language used within these categories helps us think about learning, what is more crucial is the recognition that learning opportunities come in many sizes, shapes, forms, and places. The most critical actions that educators of adults can take is to recognize the equal importance of the various types of adult learning and advocate that people use them in whatever situation or setting they find themselves.

A second section of this chapter explored the concept of organizational learning and its manifestation in the learning

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organization. In learning organizations, learning—whether done by individuals, groups, or the organization as a whole—is a central, valued, and integral part of organizational life. The heart of the learning organization is the willingness of organizations to allow their employees and other stakeholders related to the organization to suspend and question the assumptions by which they operate, then create and examine new ways of solving organizational problems and means of operating. This process requires that people at all levels of the organization be willing to think in a systems framework, with the emphasis on collective inquiry, dialogue, and action. Creating learning organizations could allow educators of adults, whether they are associated with formal or nonformal settings, to develop learning communities in which change is accepted as the norm and innovative practices are embraced.

Finally, we reviewed the evolution of the concept of lifelong learning, which has replaced lifelong education. Lifelong learning is a broader term than lifelong education because it incorporates all forms of learning, not just the formal educational system. Lifelong learning recognizes the prevalence and value of nonformal and informal learning along with the traditional formal system. This broader perspective can be seen in practice in some societies' efforts to implement lifelong learning in their societies, communities, and learning cities and regions. The term *learning society* is an attempt to capture these efforts.