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Major Elements of Re-Orienting A Higher Education Institution toward A Focus on Lifelong Learning: An Update

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Major Elements of Re-Orienting A Higher Education Institution toward A Focus on Lifelong Learning: An Update

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Major Elements of Re-Orienting A Higher Education Institutuon Toward A Focus on Lifelong Learning: An Update

Presented at

Missouri Association for Adult, Continuing and Community Education Conference
Tan-Tara Lodge – Lake of the Ozarks, Missouri

Thursday, June 23, 2005
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Room # 73

Presented by

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Creating the 21st Century School of Education

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Title of paper: Major Elements of Re-Orienting a Higher Education Institution toward
                A Focus on Lifelong Learning

Brief Description: This paper focuses on making a shift from a traditional higher
                    education institution toward a focus on lifelong learning, including
                    the following: Research on the background and experiences of
                    various institutions in this regard, developing a policy statement
                    on elements of this re-orientation as a product of a worldwide
                    conference, and ultiimately constructing "measurable performance
                    indicators" for the seven elements – overarching frameworks,
                    strategic partnerships and linkages, research, teaching and learning
                    processes, administration policies and mechanisms, decision
                    support systems, and, student support systems and services.

Major Elements of Re-Orienting a Higher Education Institution Toward A Focus on Lifelong Learning

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Some Adult Educators at the University of Missouri – St. Louis [UM-SL] were involved in researching the background of this topic on the North American Continent and the Northern Hemisphere. Other Adult Educators at The University of The Western Cape [UWC], Cape Town, South Africa were involved in researching the background of this topic on the African Continent and the Southern Hemisphere.

This informatin was shared as one backdrop for a worldwide conference on the topic of "Lifelong Learning, Higher Education and Active Citizenship" held in Cape Town in October, 2000. There were 95 Adult Educators from 19 countries at the conference. This was also a follow-up and continuation of the work begun at the Fifth International Conference on Adult education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World Conference on Higher Education in Paris in 1998.

These coming together of adult educators resulted in the formulation of the Cape Town Statement on Characteristic Elements of a Lifelong Learning Higher Education Institution. The six elements included: [1] Overarching Frameworks, [2] Strategic Partnerships, [3] Research, [4] Teaching and Learning Processes, [5] Administration Policies and Mechanisms, and, [6] Student Support Systems and Services.

Next, a five member team from The University of Missouri [UM] went to Cape Town to work with personnel from The University of The Western Cape [UWC] in May, 2001. The aim and task of this meeting was to address the issue of moving a higher education institution from a traditional orientation toward a lifelong learning orientation. The team from UM was led by Dr. John Henschke, Associate Professor of Adult Education – UM/St. Louis and Continuing Education Specialist – University Outreach/Extension, East Central Region. Other members of the UM Team were: Dr. Gwendolyn Turner, Associate Professor of Education – UM/St. Louis; Dr. Paulette Isaac, Assistant Professor of Adult Education, UM-St. Louis; Dr. Ron Turner, Executive Vice-President, University of Missouri System; and, Dr. Gary Grace, Vice-Chancellor for Student Affairs, UM/St. Louis.

The **first** section of this paper reflects mainly the findings that came from the Northern Hemisphere and focuses on the six elements mentioned above.

The **second** section focuses on the merging of the Northern and Southern Hemisphere findings which resulted in producing a copy of The Cape Town Statement, the definitions of the six elements, an explanation of the details within each of the elements, and a listing of the 95 conference participants [who contributed toward developing The Cape Town Statement], and the 19 countries from which they came.

The **third** section provides an explanation of how and why the six elements became seven elements, a complete chart of the items within each element, a chart checklist to keep track of progress on each item, and the original with an addendum of bibliographical references from which much of the material was drawn.

The **fourth** section addresses some updates and follow-through that various institutions have done regarding implementing the characteristics of a lifelong learning re-orientation and their "measurable performance indicators" into higher education and other institutions.

The Background Research Conducted on North American and Northern Hemisphere Institutions

Extensive research and experiments have been conducted into the processes necessary for moving a university or college toward a lifelong learning orientation. These ideas are presented here for consideration and assistance for those who wish to implement and test the ideas in new and different contexts

This ⸱ ⸱ focuses on the following elements: A definition of lifelong learning; Criteria producing a solution to today's lifelong learning issues, Faculty development of good practice oriented toward understanding & helping adults learn; Domains for planning and implementing a successful lifelong learning institution; Understanding developments that will change the environment in which lifelong adult learning will take place, and, The experience of adult learning innovation over the last generation and some of its important contributions to this rapidly changing environment.

I. Lifelong Learning Definition:

A master concept or principle regarded as the continuous and never complete development, changes, and adaptation in human consciousness that occur partly through deliberate action but even more as a result of the business of living, where learning may be intentional or unintentional that includes acquiring greater understanding of other people and the world at large, based on four pillars of learning: learning to live together, learning to know, learning to do, and learning to be.

II. Solution to Today's Lifelong Learning Issues in the University Will Result From:

1. Inclusiveness of adults
    -- placing high value on providing education in the adult years
    -- ongoing responsiveness to the demand by a dynamic society for providing new forms of adult education

2. Access of learning opportunities for adults through innovation
    -- responsiveness to adult learners
        + creation of greater access
        + increase of
            * pluralism &
            * multicluturalism
        + welcoming of part-time learners
        + establishment of degree programs that are
            * external &
            * competence-based
    -- a new stage of innovation marked by
        + changed faculty roles where learning takes priority over teaching (*Note -- see # III below)
        + new institutional configurations of
            * web based, asynchronous &
            * multi-institutional collaboration
        + broad application of
            * technology &
            * distance learning
        + the enduring values of
            * egalitarianism
            * individualism &
            * pluralism

III. Faculty Development of Good Practice Oriented toward Understanding & Helping Adults Learn in:

1. Determining learner needs
    -- assessed carefully
    -- addressed
        + fairly &
        + equitably

2. Adult learning programs
    -- arise from needs assessment &
    -- planned to accomplish learner outcomes

3. Adult learning experiences
    -- high quality
        * positive learning environment
        * flexibility
        * adaptability
        * mutual respect between teacher & learner
    -- adult learner-centered
        + encouraging a positive psychological environment for learning
        + allowing learner participation in the design of experiences
        + relating learning to learner's
            * prior experience &
            * application
        + using varying types of learning techniques
        + recognizing & addressing different learning styles
        + providing continuous feedback to learners
        + arranging appropriate physical settings

4. Adult learning assessment
    -- outcome based
    -- designed to evaluate participants' previous learning
        + formal or
        + informal

5. Faculty and staff needing
    -- to be adequately prepared to work with adult learners by
        + participating in faculty development learning experiences &
        + keeping abreast with the current literature and research in how to help adults learn
    -- to participate in ongoing evaluations and development of their own capabilities in six major building blocks of
        + beliefs and notions about adults learners
        + perceptions concerning qualities of effective teachers
        + ideas of the phases and sequences in the learning process
        + teaching tips and learning techniques
        + implementing the prepared plan
        + cultural and contextual awareness
    -- to articulate and clarify their own teaching philosophy regarding adult learners

6. Programs for adult learners having
    -- clearly stated missions
    -- sufficient resources to carry out their missions
        + rigorous financial administration that supports the adult, lifelong learning mission
        + necessary services for
            * learning &
            * student support
        + policies governing
            * learner confidentiality &
            * other matters
        + ethical standards for
            * learner recruitment &
            * professional practice

7. Characteristics of highly effective adult learning programs are very clearly delineated

It was as though this research snapped multiple pictures of a barely visible phenomenon from various angles, and when developed, all pictures revealed the same clear image.

Results revealed that adults can and do experience significant personal growth at midlife. However, adult students grew significantly only in one type of learning environment, they tended not to grow or to regress in another type. What was the difference? The seven key factors found in learning programs that stimulated adult development are:

1. An environment where students feel safe and supported, where individual needs and uniqueness are honored, where abilities and life achievements are acknowledged and respected.

2. An environment that fosters intellectual freedom and encourages experimentation and creativity

3. An environment where faculty treats adult students as peers--accepted and respected as intelligent experienced adults whose opinions are listened to, honored, appreciated. Such faculty members often comment that they learn as much from their students as the students learn from them

4. Self-directed learning, where students take responsibility for their own learning. They work with faculty to design individual learning programs which address what each person needs and wants to learn in order to function optimally in their profession

5. Pacing, or intellectual challenge. Optimal pacing is challenging people just beyond their present level of ability. If challenged too far beyond, people give up. If challenged too little, they become bored and learn little. Pacing can be compared to playing tennis with a slightly better player; your game tends to improve. But if the other player is far better and it's impossible to return a ball, you give up, overwhelmed. If the other player is less experienced and can return none of your balls, you learn little. Those adults who reported experiencing high levels of intellectual stimulation--to the point of feeling discomfort--grew more

6. Active involvement in learning, as opposed to passively listening to lectures. Where students and instructors interact and dialogue, where students try out new ideas in the workplace, where exercises and experiences are used to bolster facts and theory, adults grow more.

7. Regular feedback mechanisms for students to tell faculty what works best for them and what they want and need to learn--and faculty who hear and make changes based on student input

8. Changing faculty roles with the focus moving

Away From --->Toward

The Instructional Paradigm	The Learning Paradigm
Learning Theory	
> Knowledge existing 'out there'	> Knowledge existing in each person's mind & being shaped by individual experience
> Knowledge coming in 'chunks' & 'bits' delivered by instructors	> Knowledge being constructed, created, and internalized
> Learning as cumulative and linear	> Learning as a nesting & interacting of frameworks
> Fits the 'storehouse of knowledge' metaphor	> Fits the 'learning how to ride a bicycle' metaphor
> Learning as teacher-centered	> Learning as student-centered
> Learning as teacher controlled	> Learning as the students' responsibility
> 'Live' teacher, 'live' students required	> 'Proactive' learner required with teaching resources accessible
> The classroom and learning are competitive and individualistic	> Learning environments and learning are cooperative, collaborative & supportive
> Talent and ability are rare	> Talent and ability are abundant
Productivity/Funding	
> Definition of productivity as instructing the unlearned	> Definition of productivity as helping adults learn
> Cost per hour of instruction per student	> Cost per unit of learning per student
> Funding for hours of instruction	> Funding for learning outcomes
Nature of Roles	
> Faculty as authoritarian experts	> Faculty as models exemplifying lifelong learning
> Faculty as primarily lecturers	> Faculty as primarily designers & implementers of adult learning techniques & environments
> Faculty and students acting independently and in isolation	> Faculty and students working in teams with each other and with other staff
> Teachers classifying and sorting students	> Teachers helping develop every student's competencies and talents
> Staff serving /supporting faculty and the process of instruction	> All staff as educators who help produce student learning and success
> Any expert can teach	> Empowering learning through challenging and complex means
> Line governance; independent actors	> Shared governance; teamwork

IV. Domains for Planning and Implementing A Successful Lifelong Learning University:

1. A clear written statement of mission and purpose regarding the university becoming a lifelong learning institution;

2. A strong committment, including funding, to undertake the program of lifelong learning;

3. An appropriate match between adult learners and the program of lifelong learning, as exhibited through
    – Recruitment,
    – Admission into the program,
    -- Entry that is welcoming & inviting, &
    -- Continuing practices;

4. Provision of a Favorable Climate of Learning, Including
    -- Advising,
    -- Responsiveness to inquiries,
    -- Supportive procedures for application, &
    -- Other services;

5. Provision of an adult learner-oriented curriculum and modes of lifelong learning;

6. Adaptability to adult learner circumstances, either individually or in context;

7. Recognition and involvement of adult learner experience;

8. Commitment and development of faculty and staff to serve lifelong learners;

9. Clearly identified administration and governance for serving lifelong learners;

10. Ongoing evaluations for program enhancement, and documentation increasingly reflecting an orientation toward lifelong learning; and,

11. Positive program impact and future prospects for lifelong learning.

V. Understanding Developments that Will Change the Environment in which Lifelong Adult Learning Will Take Place.

1. Multiple opportunities for learning offered by diverse sources will replace the past monopoly of formal academic institutions.

2. Learners will demand and find greater flexibility and fluidity in the learning process and the accrediting of learning.

3. Technology not only will open up access to more learning but will conquer barriers of time, distance, and convenience that previously have been prohibitive.

4. Learners will plan their own learning as they need it. They will demand just-in-time learning in segments or modules to serve as building blocks to further credentials. They will seek out peers, knowledgeable persons, and other informal sources of learning wherever they are.

5. Many earners will need guidance to and help with appropriate selection among the many sources of information and learning. Services will need to be provided along the lines of a lifelong learning resource system made up of institutions, voluntary organizations, economic enterprises, the media, environmental resources, and people.

6. Employers and consumers will have greater expectation that credentials accurately represent ability to apply learning and perform roles based on that learning.

7. Many persons will experience learning as a continual process intertwined with living that enhances their economic potential, enriches their lives, and engages them with their surrounding society.

8. Disparity and inequality will continue among more and less educated people. Those who do not now recognize the value of lifelong learning will have to be actively engaged in developing their potential.

9. Greater collaboration will be necessary among institutions to share resources and between institutions and client groups such as employers, unions, governmental agencies, and social agencies to achieve mutually sought learning goals.

VI. The Experience of Adult Learning Innovation Over the Last Generation Has Contributed Some Important Elements to this Rapidly Changing Environment.

1. It has broken the constraints of older systems that prevented change.

2. It has driven institutions to explore alternative processes to reach agreed-upon ends.

3. It has raised the lifelong learners' expectations that adaptation and innovation be the order of the day in this new generation:
    – successful flexibility in
        + time,
        + place,
        + routine;
    – learning designs to serve students' varying goals;
    – learner-centered models to accomodate self-determining initiative of many learners;
    – faculty serving as mentors & facilitators to assist autonomy of learners selecting learning resources;
    – combining sensitivity and adaptability to individual learning styles in more structured models serving
        focused objectives of some groups;
    – reaching persons who reject or are unaware of the possibility of learning; and,
    – increasingly including and involving persons who have been underrepresented in higher education in the past.
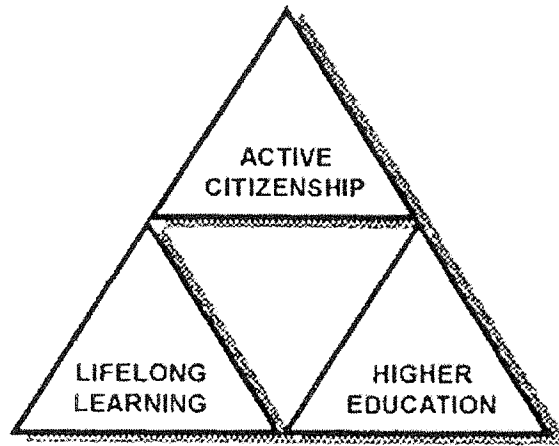
The Cape Town Statement

on

Characteristic Elements of a Lifelong Learning Higher Education Institution

January 2001

"We see a key purpose of lifelong learning as democratic citizenship, ... Democratic citizenship highlights the importance of women and men as agents of history in all aspects of their lives."

(As quoted by Professor Kadar Asmal, National Minister of Education of South Africa at the opening of the Cape Town conference, 10 October 2000.)

This statement grew out of a need recognised by adult and higher educators, scholars and specialists in the area of adult and lifelong learning to build on previous work focusing on transforming institutions of higher education into institutions of lifelong learning.

It continues the work begun at the Fifth International Conference on Adult Education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World

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> *Conference on Higher Education in Paris in 1998.*
>
> *It was developed at the conference on Lifelong Learning, Higher Education and Active Citizenship from the 10 - 12 October 2000 in Cape Town which was co-hosted by University of Western Cape, UNESCO Institute of Education and the Adult Education Research Group of the Danish National University of Education.*
>
> *We wish to acknowledge and thank the organisers of the conference : Professor Shirley Walters, Mr Werner Mauch and Professor Ove Korsgaard, who were assisted by the local team of Jenny Raatz, Glen Arendse, Jos Koetsier, Natheem Hendricks, Terry Volbrecht and Kathy Watters. Thanks also to the participants, who are listed at the back, for their active contributions.*

The Cape Town Statement is presented as an organisational tool to be developed further in local contexts. For more information or to give feedback on this document and your use of it, please contact one of the organisers listed at the end of this document.

BACKGROUND

In this statement, we are taking forward the work started at the Fifth International Conference on Adult Education in Hamburg, Germany, 1997, continued at the University of Mumbai, India in 1998, and the UNESCO World Conference on Higher Education in Paris in 1998.

We recall the commitment made in Article 19 (a) of the Agenda for the Future adopted by the Fifth International Conference on Adult Education to

[open] schools, colleges and universities to adult learners:

(a) by requiring institutions of formal education from primary level onwards to be prepared to open their doors to adult learners, both women and men, adapting their programmes and learning conditions to meet their needs;

(b) by developing coherent mechanisms to recognize the outcomes of learning undertaken in different contexts, and to ensure that credit is transferable within and between institutions, sectors and states;

(c) by establishing joint university/community research and training partnerships, and by bringing the services of universities to outside groups;

(d) by carrying out interdisciplinary research in all aspects of adult education and learning with the participation of adult learners themselves;

(e) by creating opportunities for adult learning in flexible, open and creative ways, taking into account the specificities of women's and men's lives;

And we recall the Article 1(b) of the *World Declaration on Higher Education for the Twenty-First*

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Century which states that core missions and values of higher education are to:

provide opportunities for higher learning and for learning throughout life, giving to learners an optimal range of choice and flexibility of entry and exit points within the system, as well as an opportunity for individual development and social mobility in order to educate for citizenship and for active participation in society, with a worldwide vision, for endogenous capacity building, and for the consolidation of human rights, sustainable development, democracy and peace, in a context of justice;

as well as Article 1(a) of the *Framework for Priority Action for Change and Development of Higher Education* which states that

no discrimination can be accepted, no one can be excluded from higher education or its study fields, degree levels and types of institutions on grounds of race, gender, language, religion, or age or because of any economic or social distinctions or physical disabilities;

We take into account, that lifelong learning is dependent on both the individual and the social context and that learning occurs in institutions, but can also occur anyway, anywhere and at anytime throughout life. That is, it is life long, life wide, and life deep.

As pointed out in *The Mumbai Statement on Lifelong Learning, Active Citizenship and the Reform of Higher Education,* we understand, that

the transformation to genuine lifelong learning institutions requires a holistic approach which a) supports the institution becoming a lifelong learning community itself; b) integrates academic, financial and administrative elements; c) provides structures which are responsible for organizational, staff, student and curriculum development and community engagement; and d) aligns the various supportive structures such as academic information systems, library provision and learning technologies to the new mission of universities in learning societies (Art. 9);

and that a key purpose of lifelong learning is active citizenship which is important in terms of

connecting individuals and groups to the structures of social, political and economic activity in both local and global contexts. Democratic citizenship highlights the importance of women and men as agents of history in all aspects of their lives (Art. 3).

Thus lifelong learning enables students to learn at different times, in different ways, for different purposes at various stages of their lives and careers. Lifelong learning is concerned with providing learning opportunities throughout life, while developing lifelong learners. Furthermore, in a Higher Education Institution (HEI) all members of the institution are learners and that at different times the members of the institution will take on different roles. These roles include educator, student, administrator, cleaner, and so on.

The Future

While we recognise that it is difficult to create a generic document, which can work across differing contexts, and yet still makes sense in a specific context, we have developed a set of elements, which characterise a Lifelong Learning Higher Education Institution, for use as an instrument to assist transformation within HEIs. We also recognise that performance indicators which provide quantifiable measures, covering individual, social and economic development needs would be helpful. The development of such indicators should be based on the profound knowledge of respective systems of higher education and emerging systems of lifelong learning.

In developing indicators which assess a lifelong learning HEI which ensures "no discrimination on

grounds of race, gender, language, religion, or age or because of any economic or social distinctions or physical disabilities", it is essential to monitor the experiences of all lifelong learners (including students and staff) across the various social categories. **Lifelong learning challenges the dominant paradigm of HEIs, therefore the experiences of adult learners need to be monitored with extra care.**

This document suggests the following six sets of characteristic elements which are necessary to support a lifelong learning HEI. The following table gives these six characteristic elements and a short description.

Characteristic Elements   Description

Characteristic Elements	Description
1. Overarching Frameworks	Overarching frameworks provide the contexts, which facilitate an HEI to operate as a lifelong learning institution. These are: Regulatory, Financial and Cultural/Social.
2. Strategic Partnerships and Linkages	Partnerships and linkages include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups in society.
3. Research	Research is understood in a broad sense and includes working across disciplines and / or across institutions. Lifelong learning is regarded as an important and legitimate research area.
4. Teaching and Learning Processes	Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches.
5. Administration Policies and Mechanisms	Service to learners is the top priority of the administration
6. Student Support Systems and Services	Learners are supported to become independent learners in various ways

1. Overarching Frameworks

Overarching frameworks provide the context that facilitates an HEI to operate as a lifelong learning institution. These are: Regulatory, Financial and Cultural/Social.

Regulatory

- A facilitating regulatory framework promotes lifelong learning and covers financial, legal and

social concerns.
- The national and/or regional economic and social developmental strategies and implementation plans support lifelong learning.
- A national framework facilitates vertical and lateral mobility of learners

Financial

- At a national and institutional level a financial plan is in place to support the transformation of HEI into lifelong learning institutions.
- Institutional planning and implementation strategies integrate financial, academic and administrative elements.

Cultural/ Social

- There is a culture which supports learning for all, across differences regarding social class, caste, gender, 'race', religion, and at all stages in life.
- There is a national, regional and institutional commitment to making learning opportunities available to all.

2. Strategic Partnerships and Linkages

In partnerships and linkages we include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions as well as forming relationships with other groups/sectors in society.

International partnerships and linkages

- Lifelong learning institutions in the globalizing world strive for a broad exchange on teaching/learning systems and collaboration across national boundaries. This is for: sharing knowledge and know-how; partnerships and alliances based on common interest, mutual respect and desire to attain social justice, globally and locally; enhancing the sharing of skills, research opportunities, and staff and student development.

Partnerships and linkages across institutions and society

- A lifelong learning HEI strives for greater collaboration among institutions and between institutions and client groups such as trade unions, governmental agencies, other educational sectors, social agencies and employers to achieve mutually sought goals. This includes sharing human and other resources and embarking on joint research projects.
- The development of a `learning region` together with other social partners is part of the commitment of the institution

Partnerships and linkages within institutions

- Decision-making is a shared responsibility based on collaborative processes among academic staff, service staff and learners to create rapid responses to learner and community needs. These stakeholders are involved in decisions on choice of programmes, assessment of learning outcomes, curriculum design and methods.
- Policies and strategies are in place to foster interaction among learners, faculty, communities

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and the economy in order to encourage commitments to social justice both locally and globally.
- The lifelong learning HEI is involved in developing, evaluating and implementing educational programmes for all sectors of education, not only the Higher Education sector

3. Research

Research is understood in a broad sense and includes working across disciplines and / or across institutions. Lifelong learning is regarded as an important and legitimate research area.

- Lifelong learning is regarded as an important and legitimate research and teaching area.
- Research working across disciplines and institutions is recognised and promoted.
- There is collaborative research with civil society, the economy and learners.
- Different paradigms of research are recognised. This includes amongst others action research, case studies and story telling.
- There is ongoing research and development to meet the changing needs of the learner community, to promote broad access and to facilitate successful learning.
- There is ongoing research to assess the transforming institution

4. The Teaching and Learning Processes

Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches

- Educators engage with the knowledges, interests and life situations that learners contribute to the teaching/learning processes and they build on the resources and experiences of the learners. Different `ways of knowing` are valued which enable marginalised social groups to be full participants in the creation and dissemination of knowledge.
- Educators facilitate and manage learning rather than dispense information. Learners are seen by educators as co-creators of knowledge and are often encouraged to participate in the design of learning activities including mechanisms of continuous evaluation and feedback.
- Educators recognise the need for reflective / practice based learning.
- Educators recognise the value of keeping up to date with theories and best practices of adult learning across age and other differences.
- Educators and learners recognise that learning in higher education can take place according to flexible schedules and at different locations. They incorporate this into course design and presentation and ensure that the materials and structures for learning made available through the institution overcome the barriers of place, space, time and pace which restrict opportunities for learning in traditional structures.
- The institution makes its resource-based learning environment accessible to learners wherever they are, not just on campus. Learners are encouraged to make use of support services such as the library. Such services are made available through suitable technology according to the needs of the students' off-campus as well as on campus.
- Course presentation and opportunities to enrol for and study courses include the use of multi- and combined-media delivery and support, utilising the technologies, both old and new, and the flexible learning structures of open and distance learning. This includes print, correspondence, mass media, occasional face-to-face tutorials and study-groups, ICT etc.

- Provision is made for self-paced independent study by providing for students to study effectively wherever, whenever and whatever pace is appropriate for them.
- Assessment takes place in various forms and continuously.
- Programmes include opportunities for experiential learning (e.g. field work, workplace learning, community service learning)

5. Administration Policies and Mechanisms

Service to learners is the top priority of the administration

- The institution needs to indicate in the mission statement its intention to be an open and lifelong learning institution. There also needs to be an implementation strategy as part of the overall planning in the institution together with the necessary resource allocations.
- University course information booklets embrace the notion of lifelong learning.
- Service to students is the top priority of the administration department - so registration, lecture times and academic support are all available at times and in formats geared to the convenience of learners including off-campus open learners. Registration occurs regularly throughout the year.
- Prior learning is recognised, both in terms of obtaining access and getting credit for modules. This includes having clearly defined criteria for what constitutes tertiary level learning.
- Programmes are in place to facilitate implementation of recognising prior learning (RPL). This includes training people to do the assessment as well as preparing educators to be cognisant of RPL in their teaching and design of curriculum.
- In addition to RPL, progress is made towards a more flexible, open entry system which, along with careful counselling, is designed to give students the chance to prove themselves rather than to exclude where formal criteria are not met.
- The turnaround time on assignments, especially for distance students, is kept to a minimum and specified to the learners so that they can use feedback on their assignments to inform their learning on an ongoing basis.
- More flexible curricular compilation structures (in which students can exercise choice of subjects and subject combinations relevant to their own individual needs) are in place leading to recognised qualifications.
- Much more flexible progression rates and ability to move between different study modes within a qualification are in place.
- Programmes are arranged to allow for flexible entry and exit points.

6. Student Support Systems and Services

Learners are supported to become independent learners in various ways

- The obligations and responsibilities of the learners and the educational providers are made clear at registration.
- It is clear what resources and equipment the provider will supply, and where, and what the learners themselves have to supply.
- The institution creates and maintains geographically dispersed and technologically accessible learning and support structures wherever the students are.
- Tutors are selected and trained for their role of facilitating learning.
- Learners are supported to become independent learners through the use of various forms.

These must include: technology old and new throughout the geographical area where students live for tutoring at a distance, contact tutoring, teaching on assignments, mentoring, counselling (both remote and face to face) and the stimulation of peer support structures.

- There is a constant effort to be creative about the ways to keep costs low for students, including multiple avenues for paying tuition.
- Childcare, transport and catering are available to ensure a safe, secure and comfortable environment to meet the needs of all learners. This includes the special needs of learners with a disability as well as those studying at-a-distance.

List of delegates at Cape Town Conference

Prof John Aitchison	South Africa	Prof Ove Korsgaard	Denmark
Ms Lucy Alexander	South Africa	Ms Petra Lawson	South Africa
Ms Randi Anderson	Denmark	Prof Geoff Layer	England
Dr Mejai Avoseh	Namibia	Mr Wolfgang Leumer	South Africa
Mr Ivor Baatjies	South Africa	Prof P.C. Lubout	South Africa
Prof Saleem Badat	South Africa	Ms Marieda Luyt	South Africa
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Mr Johan Bolts	Germany	Mr Werner Mauch	Germany
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The Measurable Performance Indicators

One of the major trends in LLL focuses on Performance Indicators (PI) that require the characteristic elements to be measurable and concrete in action. It is well to note that moving educational institutions toward serving the needs of all lifelong learners, is a lifelong endeavor that will continue for many years. The discussions between the UM Team and the UWC Personnel modified the original six (6) "Characteristic Elements" into seven (7). The seventh one that was added to the origiinal six was "Decision Support Systems. A few accompanying "Measurable Performance Indicators" are indicated in the list that follows.

(1) **Overarching Frameworks** – provide the context that facilitates operation as a lifelong learning institution. This would mean that all stakeholders relating to the institution have a financial policy and implementation plan, the legal framework, and the cultural/social sensitivity as a foundation to operating the institution for serving lifelong learners.

(2) **Strategic Partnerships & Linkages** – form collaborative relationships internationally, with other institutions nationally, and with other groups in society. The indicators needed here will focus on increasing the institution wide concern with promoting and increasing the number and quality of partnerships across multiple departmental, institutional, national, and international boundaries. Decisions regarding choice of programmes, assessment of learning outcomes, curriculum design and methods are a shared responsibility based on collaborative processes among academic staff, service staff and learners.

(3) **Research** – includes working across disciplines, institutions, investigating what kinds of institutional adjustments need to be made to help the institution better serve lifelong learners: i.e. convenience, transportation, child care services, locations of offerings, library accessibility, computer and website services, etc. In addition, targets are set for increasing and encouraging a broader range of research paradigms: action research, case studies, story telling, etc.

(4) Teaching & Learning Processes – Educators will need to move their teaching and learning processes away from the "instructional paradigm" toward the "learning paradigm." thus encouraging self-directed learning, engaging with the knowledges, interests and life situations which learners bring to their education, and using open and resource based learning approaches. They will need to use different teaching methods that respond to the diverse learning styles of lifelong learners, including co-learning, interactive learning, and continuous learning while integrating appropriate technology. The learners and faculty will need to mutually design individual learning programs that address what each learner needs and wants to learn in order to function optimally in their profession. This all means that the institution plans to employ and develop faculty who see their primary roles as facilitators of the learning process as opposed to dispensers of information, thus moving their development toward: knowing as a dialogical process; a dialogical relationship to oneself; being a continuous learner; self-agency and self-authorship; and connection with others.

(5) Administration Policies & Mechanisms – service to learners is the top priority of the administration. The mission statement and allocation of resources, including staffing is increased to reflect the institutional commitment for operating a lifelong learning institution. The operational system in imbued with a belief that demonstrates active and systematic listening turned into responsiveness to meet needs of lifelong learners. Registration, class times, and courses – including modular choices and academics support – are available at times and in formats geared to the convenience of learners.

(6) Decision Support Systems – provide within the institution and community an atmosphere that is people-centered, caring, warm, informal, intimate and trusting. It also maintains a demographic profile on programs aimed at increasing the numbers of: students served, courses offered, locations of offerings, and contracts for educational programs with different organizations.

(7) Student Support Systems & Services – provides learner-friendliness, convenient schedules, and in various ways encourages independent learning. Obligations and responsibilities of the learners, educational providers and administration service are made clear from the beginning.

The complete list of "measurable performance indicators" follows in the extensive chart provided on the next pages.

"MEASURABLE PERFORMANCE INDICATORS"

FOR THE

CHARACTERISTIC ELEMENTS

OF A

LIFELONG LEARNING

HIGHER EDUCATION INSTITUTION

This is our "outsiders'" perspective of what we think are indicators of a lifelong learning educational institution (HEI). However, there is one thing that needs to be made clear: Lifelong Learning (LLL) is a contested concept—there is no agreement on where and in what institutions LLL should or should not be implemented.

Definition:

Lifelong Learning is a master concept or principle regarded as the continuous and never complete development, changes, and adaptation in human consciousness that occur partly through deliberate action but even more as a result of the business of living, where learning may be intentional or unintentional that includes acquiring greater understanding of other people and the world at large, based on four pillars: being, knowing, doing, and living together.

I. Overarching Frameworks

Overarching frameworks provide the context that facilitates an EI to operate as a lifelong learning institution.

	doing already	working towards	not doing	not sure	comments / evidence
Regulatory					
1. The National Department of Education has a **financial policy** and implementation plan in place to promote lifelong learning at HEIs.					
2. The National Department of Education has the **legal framework** and an implementation plan in place to promote lifelong learning at HEIs.					
3. The National Department of Education has addressed **social concerns** in their policy and implementation plan to promote lifelong learning at HEIs.					
4. The regional economic and social developmental plans include supporting lifelong learning.					
5. The Institution has a financial plan in place to support lifelong learning.					
6. The Institution has a culture that supports adult centered learning and is sensitive to and respectful of the needs, differences, and contributions they bring to the teaching and learning transaction.					
7. An active collaboration and communication across all segments of the institution to meet the educational, career, financial, and personal needs of LLLs.					
8. There needs to be a deliberate on-going commitment to high level of communication between the University and LLLs.					

II. Strategic Partnerships and Linkages

In partnerships and linkages we include three types of relationships

	doing already	working towards	not doing	not sure	comments / evidence
International partnerships and linkages					
1. A record is kept and uses are made at the institutional level of the extent of exchange, sharing of skills, research opportunities, student and staff development, and collaboration across national boundaries.					
Partnerships and linkages across institutions & society					
2. A record is kept and uses are made at the institutional level of the extent of collaboration in terms of the sharing of human and other resources, as well as joint research projects across institutions and society. This includes trade unions, governmental agencies, other educational sectors, and employers.					
Partnerships and linkages within institutions					
3. A record is kept and uses are made at the faculty level of responses to learner and community needs.					
4. A record is kept and uses are made for reviewing periodically for program improvement and evaluation to determine how the types of relationships are improving programs.					
5. A record is kept and used for making appropriate adaptations and modifications.					

III. Research

Research is understood in a broad sense and includes working across disciplines and/or across institutions. Lifelong learning is regarded as an important and legitimate research area.

	doing already	working towards	not doing	not sure	comments/ evidence	area
1. Collaborative research **across disciplines and/or institutions** is promoted and a record of this work is kept at faculty level.						
2. Collaborative research with **civil society, the economy and learners** is promoted and a record of this work is kept at faculty level.						
3. A broad range of research paradigms are used. Targets are set to increase forms such as action research, case studies and story telling.						
4. Appropriate mechanisms are established to evaluate the extent to which The Institution's indicators are fulfilled.						
5. Performance indicators of lifelong learning will continue to be developed and enhanced during the life of the institution.						
6. Systematic dissemination of research information to the general public and population.						
7. Systematic collection of data on student expectations, experiences, needs, and satisfaction level.						
8. Appropriate mechanisms will be established to evaluate the extent to which The Institution's indicators are fulfilled.						
9. Performance indicators of LLL will continue to be developed and improved over the LLL of the institution.						

IV. The Teaching and Learning Processes

Educators encourage self-directed learning, engage with the knowledges, interests and life situations which learners bring to their education and use open and resource based learning approaches.

The institution provides a central infrastructure in the form of libraries services, informational support and personnel necessary for lifelong learners.

Self-directed learning (SDL) is one of the highly effective characteristics of LLL. SDL is where students take responsibility of their own learning. They work with faculty to design individual learning programs that address what each person needs and wants to learn in order to function optimally in their profession.

Active involvement in learning -- as opposed to passively listening to lectures, where students and instructors interact and dialogue, where students try out new ideas in the workplace, where exercises and experiences are used to bolster facts and theory -- helps adults grow more.

Institution role

Plans exist to employ and develop faculty who see their primary roles as facilitators of the learning process as opposed to dispensers of information.

	doing already	working towards	not doing	not sure	comments / evidence	area
1. The institution employs faculty who do not limit themselves to the traditional role of lecturer in the classroom, and may perform in blended roles that include administrative duties, advising, teaching and facilitating. [Council for Adult & Experiential Learning (CAEL).]						

2. The institution engages all learners in a thorough process of education and career planning to determine their level of educational development upon entry, their educational and career goals, and a plan for reaching these goals as efficiently as possible. (CAEL)

3. Number of credits awarded for Recognition of Prior Learning (RPL) / Alternative missions and life experiences are increased by a certain percentage within a specified time period.

4. The institution is supportive of staff development.

5. The institution supports on-going summative evaluations at the end of the modules for improvement of instruction and for the benefit of learners.

6. Up-to-date records are kept of enrollment and throughput of adult learners.

7. Content of the lecturer development needs to be oriented toward facilitation of LLL.

8. The institution approves and certifies a variety of instructional delivery systems.

9. The institution provides an atmosphere that is people-centered, caring, warm, informal, intimate, and trusting.

Educator role

The educator should understand and reflect the values of the mission in curriculum design and delivery.

Educators will respond to the needs of students who enter alternative admissions policies.

An environment is needed where faculty treats adult students as peers – accepted and respected as intelligent, experienced adults whose opinions are listened to, honored, and appreciated.

The educators are encouraged to use different teaching methods and techniques to respond to the diverse learning styles of LLLs including a co-learning, interactive learning, and continuous learning while also integrating appropriate technology.

Educator Role (continued)

10. Educators and tutors demonstrate competencies as lifelong learners effective learner-centered instruction.

11. An environment is provided where faculty treats adult students as peers—accepted and respected as intelligent experienced adults whose opinions are listened to, honored, appreciated.

12. Educators will improve their own competencies in LLL.

13. Educators will offer themselves to the students as exemplifying a model of LLL.

14. The curriculum is developed so that traditionally marginalized social groups inside and outside the institution can be full participants.

15. Assessment is conducted in various forms and used to improve the quality of learning in LLLs.

16. Educators optimally pace and challenge the learners' intelligence just beyond their present learning abilities.

Learner role

17. Learners provide the faculty with relevant information so they can assess educational development and convey credit where appropriate.

18. Learners engage actively in the process of learning.

19. Learners perceive that their individual needs and uniqueness are respected.

20. Learners perceive that their abilities and life achievements have been acknowledged and respected in the classroom.

21. Learners are engaged in a self-assessment process for determining readiness for self-direction in carrying out their LLL.

22. Learners will engage in Self-Directed Learning (SDL).

23. Learners will seek intellectual challenge.

24. Learners will engage actively with the lecturer and other students.

25. Learners will pursue intellectual freedom, experimentation and creativity.

26. Learner expects to be treated as an intelligent adult whose opinions are listened to, honored, and appreciated.

V. Administration Policies and Mechanisms

Service to learners is the top priority of the administration

	doing already	working towards	not doing	not sure	comments / evidence
1. The mission statement and the allocation of resources, including staffing, reflect the commitment of the institution to lifelong learning (LLL) at The Institution.					
2. There is a strategic plan and action steps for implementing lifelong learning in the institution.					
3. Admission processes are inclusive and non-competitive so as to match the educational processes to the needs of the lifelong learners.					
4. There is Council commitment and executive leadership to implement the lifelong learning policy.					
Recruitment / Marketing					
5. The operational system is imbued with a belief that demonstrates active and systematic listening turned into responsiveness to meet the needs of lifelong learners.					
6. The marketing process, covering all faculties, target a wide range of learners, specifically traditionally marginalised groups.					
7. Admission processes are inclusive and non-competitive so as to make a match of the educational processes to the needs of the LLLs.					
8. The information booklet addresses the needs of the entire target population, including part-time learners.					
9. The information booklet supports the notion of lifelong learning.					
10. The marketing process reflects an understanding of and sensitivity to the roles and responsibilities of adults.					
11. The marketing process reflects an understanding of and sensitivity to the roles and responsibilities of adult learners.					
12. Alumni are encouraged to invite others to join this lifelong learning institution.					

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Access				
13. The entry and exit points of programmes are flexible				
14. All learners have access to scholarships, including part time learners.				
15. Registration, lecture times, and courses -- including modular choices and academic support -- are available at times and in formats geared to the convenience of learners.				
16. Prior learning is recognised, both in terms of obtaining access and getting credit for modules.				
Throughput				
17. Systematic data of student throughput are collected, analyzed, and distributed throughout the university for the purpose of improving the graduation rate of LLLs.				
18. Systematic data of student throughput are collected, analyzed, and distributed throughout the university for the purpose of supporting and improving student successes.				

VI. Decision Support Systems

	doing already	working towards	not doing	not sure	comments / evidence
1. The Institution conducts an annual assessment and evaluation of lifelong learners' needs, expectations, and satisfaction for the purpose of tracking, marketing, and improving programs/services.					
2. A demographic profile is kept on programs aimed at increasing the numbers of:					
-- students					
-- courses offered					
-- locations of offerings					
-- contracts with different organizations					
3. Decisions regarding choice of programmes, assessment of learning outcomes, curriculum design, and methods is a shared responsibility based on collaborative processes among academic staff, service staff and learners.					
4. Alumni are actively sought and encouraged to recruit others to join this lifelong learning institution.					
5. Courses are regularly assessed by learners.					
6. Curriculum development for lifelong learning with appropriate approval mechanisms will be established, maintained, and evaluated.					
7. The Institution provides an atmosphere that is people-centered, caring, warm, informal, intimate, and trusting.					

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VII. Student Support Systems and Services

The institution provides learner-friendly services at times convenient to the schedules of lifelong learners. Learners are also supported to become independent learners in various ways.

	doing already	working towards	not doing	not sure
1. Obligations and responsibilities of the learners, educational providers and administration services are made clear from the beginning.				
2. The strategic plan provides for:				
-- transport and catering facilities are available for part-time learners				
-- the needs of learners with a disability are looked after				
-- the needs of learners studying at a distance are looked after				
-- childcare facilities are available				
-- safe and secure learning environment				
-- health care facilities are available for all learners				
3. Support structures are in place for wherever and whenever there are learners.				
4. Support programmes are available to educators requiring guidance in dealing with "non-traditional" students.				
5. Counseling (remote and face-to-face), advising, and career development are all visible commitments to learners who are enrolled in evening classes				

Updates and Follow-Through on Implementing the "Measurable Performance Indicators into Various Institutions

In September, 2003, a six-year review on the UNESCO Institute of Education [UIE] 1997 Hamburg, Germany Confintea V Conference was held in Bangkok, Thailand. The "measurable performance indicators" [MPI] for characteristic elements of a lifelong learning higher education institution, were distributed and discussed among the eighteen [18] representatives of the participating institutions. These MIP have been shared and presented to numerous adult education conferences in the USA and internationally. In addition, Barnes, Jewish, Christian [BJC] Health System [the fourth largest in the USA] adopted the MPI as the standard toward which the institution will move itself in re-orienting their focus.

In the 2002 annual report of the Division of Lifelong Learning at The University of The Western Cape [UWC] in South Africa, they posted their progress regarding key performance areas of lifelong learning : Recognition of Prior Learning [RPL], advocacy for a lifelong learning orientation, workplace learning and continuing education, part-time studies, and lifelong learning research and teaching. By 2003 the UWC Senate decided to adopt a thematic approach to monitoring the lifelong learning mission at UWC.

The theme for 2004 at UWC was on accredited part-time studies, in which they also developed the substantially revised fourth edition of "Juggling to Learn." A handbook for students, educators and administrators in the UWC part-time programme. The aim of this document is to improve the quality and success of part-time provision at UWC by: [1] Providing suggestions for getting started in the programme; [2] Giving information on useful services; [3] Giving tips on learning and teaching; and, [4] Communicating the protocol and encouraging its implementation.

Additional examples of implementing the MPI will be provided as they become available and known in the future. Further explanation of the MPI implications will also be presented, as information about the results are shared by the various organizations and institutions.

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