Chapter 7

Realizing a lifelong learning higher education institution

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Activists and scholars committed to lifelong learning for social justice and democratic citizenship have devised a framework for transforming higher education in the new South Africa. The author draws on this work, developed at the University of the Western Cape, to examine the extent to which her own institution is addressing the challenges it presents. The former context of apartheid has left a legacy where few black and poor people – particularly women – have had experience of higher education. To realize the potential of lifelong learning in an emancipatory narrative requires an awareness of issues for change for individuals and organizations. Ultimately, it involves challenging ideas and assumptions about identity, pedagogy, epistemology and power relations.

Introduction

Higher education policy in many parts of the world, at institutional, national and international levels, is peppered with references to lifelong learning. *The World Declaration on Higher Education for the Twenty-first Century: Vision and Action* (UNESCO 1999) has at least seven direct references to lifelong learning and an equal number of indirect ones. Higher education is responding to a new discourse of lifelong learning born in the 1990s. As Bourgeois *et al.* (1999: 173) state, 'the new lifelong learning combines old and abiding concerns about equity, with emphasis upon higher education as a means to equip for employment and for survival in conditions of uncertainty and loss of security in employment'. Still more recently, scepticism has grown about the official and political adoption of lifelong learning, as furthering the interests of a rampant neo-liberal economic agenda (Crowther 2004).

Within higher education there are scholars and activists who are concerned particularly with the equity and social justice dimensions of lifelong learning who are striving to realize lifelong learning higher education institutions (HEIs). They are undertaking organizational, pedagogical and political work to help move from symbolic policies of lifelong learning, that remain at the rhetorical level, to ones which become embedded practice within institutions.

This chapter explores what it means to realize a lifelong learning higher education institution by using a framework, *The Cape Town Statement on Characteristic*

Elements of a Lifelong Learning Higher Education Institution (DLL 2001) to describe and analyse what is happening in one institution. I focus on the University of Western Cape in South Africa (UWC), where I have been involved for twenty years as a champion of adult and lifelong learning, in order both to assess the value of the framework and to highlight key issues and challenges. UWC is a historically black, urban university based in South Africa, which is a middle-income country recently emerged from a protracted liberation struggle. The country's re-entry into the global economy is heightening the tensions between economic development, equity and redress. As such South Africa, and its higher education institutions, is both a mirror reflecting these processes and a lens through which to examine them. The chapter will begin with a description of the framework and will then move onto its application to UWC.

Characteristic elements of lifelong learning higher education institutions

Higher education within a lifelong learning framework and approach is quite new (Volbrecht and Walters 2000). Lifelong learning assumes multiple meanings and interpretations. It is a contested concept that is not always seen as 'a good thing'. As Taylor *et al.* (2002) state, lifelong learning is seen variously as concerned essentially with vocationalism and performativity, social control and incorporation, pluralistic complexity within a post-modern framework, personal development and growth, and radical social purpose and community development.

A group of international scholars and activists within higher education developed an organizational framework to assist them in the realization of their mission to develop lifelong learning for active and democratic citizenship. They did so at a meeting in Cape Town in 2000, co-hosted by the UNESCO Institute for Education, the Danish Pedagogical University, and UWC, to grapple with 'Lifelong learning, higher education and active citizenship'. They agreed that potentially education:

> connects individuals and groups to the structures of social, political and economic activity in both local and global contexts, and emphasizes women and men as agents of their own history in all aspects of their lives.

And the working definition of lifelong learning is that:

> it 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.
>
> (DLL 2001: 4)

It is concerned with both flexible, convenient, relevant provision of learning opportunities and with curricula that promote lifelong learning qualities. Lifelong learning is 'lifelong, life wide and life deep' (DLL 2001: 4). In these terms, they recognized that implementing lifelong learning assumes the need for major pedagogical, organizational and social changes.

The Cape Town Statement (DLL 2001: 6) describes six useful 'Characteristics elements' that have guided the work at UWC and elsewhere (Dunlop and Nesbit 2004). See Table 7.1 below.

These broad categories indicate a systemic awareness of the interconnections between the macro-environment, the meso-organizational context and the micro cognitive and affective learning interactions. A lifelong learning framework forces our gaze both inwards towards individual and organizational learning and outwards towards relationships in the broader society (Volbrecht and Walters 2000).

Changing the culture and the practices within higher education institutions is a daunting task. The literature which refers to the struggle to create adult-focused universities is illustrative of this. Bourgeois *et al.* (1999) argue that the 'struggle for adultification' requires a combination of 'successful actor strategies in decision- and policy-making', and 'conducive conditions related to organizational structure and context'. They too emphasize the interconnectedness of the macro, meso and micro levels both within the institution itself and reflecting the institution's place in the broader society.

Table 7.1 Characteristic elements of the Cape Town Statement

Characteristic	Description
Overarching frameworks	Overarching frameworks provide the context which facilitates an HEI to operate as a lifelong learning . institution. These are: regulatory, financial and cultural/social.
Strategic partnerships and linkages	Partnerships and linkages include the following: forming relationships internationally; forming relationships with other institutions; forming relationships within institutions; and forming relationships with other groups in society.
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 focus for research activity.
Teaching and learning	Educators encourage self-directed learning and engage with the knowledge, interests and life situations that learners bring to their education and use open and resource-based learning approaches.
Administration policies and mechanisms	Service to students is the top priority of the administration.
Student support systems and services	Learners are supported to become independent learners in various ways.

Realizing the lifelong learning mission

I turn now to a reflection of the process of realizing the lifelong learning mission at UWC with the help of the framework. Organizationally the lifelong learning mission at UWC is driven by a small cross-cutting structure, the Division for Lifelong Learning (DLL), which reports to the Academic Vice-Rector, and which is represented on the Senate Executive and other high level committees. This has been the catalyst for ongoing advocacy and implementation of the mission and is a key 'actor' in the project. While the DLL has been working from the centre to support faculties and advocate for new practices, the implementation occurs primarily in the faculties. The relationships amongst the DLL, faculties and central administration are not uncontested as debates continue about whether there is a need for a central catalytic agency, with some feeling that the lifelong learning mission has been sufficiently 'mainstreamed' and others arguing that without the DLL the mission would 'lose its way'.

Overarching frameworks

Conducive conditions are needed in order to realize a lifelong learning institution. So what are these? What are the regulatory, financial, cultural, historical, legislative frameworks which encourage or discourage the implementation of lifelong learning practices? Is there consensus on a working definition of lifelong learning?

Working definition of lifelong learning

There is no consistent or elaborated use of the term lifelong learning in the various government policy documents in South Africa. It can be interpreted at one end of a spectrum to mean continuing professional education and, at the other end, it can imply major pedagogical and organizational shifts. It can also be primarily seen as relating only to mature learners or to all learners. Within UWC, as Bourgeois *et al.* (1999) mention, the old and abiding concerns about equity and redress exist, along with those about employment and survival in conditions of uncertainty and loss of security. While the working definition from the Cape Town Statement has been adopted in official documents at UWC, the definition of lifelong learning itself is contested and is debated and discussed continuously. It cannot be assumed that there is consensus on the definition.

Cultural/Social context

Realizing lifelong learning HEIs means that organizational cultures need to change. In South Africa as elsewhere, the picture that holds many institutions captive is still that of a lecturer speaking or reading to a class of young adults. This is true too at UWC despite the fact that about 22 per cent of the 14,000 students are part-time, many work, and the majority of all students are women who are on average 27

years old, and are poor. The challenge of changing this dominant picture can be seen, for example, in the debates and practices of widening access to HEIs for 'non-traditional students' and 'non-traditional ways of learning' even where they are in the majority (Schuetze and Slowey 2000). In addition, Bourgeois *et al.* (1999) remind us of the resilience of the status accorded to 'research' as opposed to 'teaching' universities. Lifelong learning institutions by definition are concerned with learning and teaching; will they therefore by definition have lower status?

It is important to locate the decision taken in 1998 to set up the DLL to drive the lifelong learning mission in the UWC context of the time. Student numbers had been falling consistently and there were predictions of a headcount of 6000 students in 1999. Over 40 academics were retrenched in June of that year and the trade union was on strike to resist the laying off of their members. There were crisis meetings of Senate and a proposed vote of no confidence in the Rector was narrowly averted. There were major changes amongst executive leadership with several temporary appointees. It is fair to say that the institution was in crisis.

In the broader policy environment there was a flurry of activity on almost all education and training fronts, including the establishment of the South African Qualifications Authority (SAQA) and the emergence of the national skills development strategy. These held the promise of rapid growth in workplace learning possibilities and facilitation of access and flexibility in the education and training systems. Simultaneously UWC's history resonated with the institutional and national commitment to lifelong learning as it prided itself on its contribution to the liberation struggle and its distinctive academic role in helping achieve equity and social justice for the black majority.

It was at this time of crisis and national re-configuration that the DLL was set up. A major concern was to increase student numbers, while contributing to equity, and it was argued that part-time and continuing education students should be targeted, new marketing strategies implemented, and quality and types of services and support be improved. In early 1999, it was decided that the DLL was to focus initially on helping stem the tide of diminishing numbers; therefore emphasis was placed on marketing the university and on access, particularly recognition of prior learning (RPL). While the issues of improving quality were seen as crucial, the imperative of the time was student numbers.

At UWC these strategies are contributing to changing perceptions but the broader national context is critical to the creation of a conducive environment. As I describe elsewhere (Walters 2004), the *National Plan for Higher Education* prioritizes the need to broaden the social base of higher education by increasing access to higher education of workers and professionals in pursuit of multi-skilling and re-skilling, and of adult learners denied access in the past. They propose to promote RPL initiatives to increase the intake of adult learners. The major structural shifts in the economy over the last twenty-five years, the endemic shortage of high-level professional and managerial skills, and the impact of HIV/AIDS on the labour force, has ensured that there is recognition of the significant need for continuing education of workers. In addition, the inadequate numbers of school-leavers with

the necessary entry requirements mean that the demands for higher education graduates in the economy have to be met by ensuring adult learners gain access. Generations of black people and women were excluded from higher education for either political or economic reasons. There has been a push from individuals, organized labour and government to ensure redress for those who were excluded from access to higher education and it is beginning to have an uneven effect (Cooper and Subotzky 2001).

While the policy rhetoric supports adult and lifelong learning there are various signals that lead to a questioning of its substantive nature. For example, it is interesting to note that while the National Plan sets participation targets for the 18–24-year-olds there are no similar targets for adult learners. There are examples of a disjuncture between the policy goal of widening access to non-traditional students and government practices.

In South Africa, while the reality has been that the historically black institutions have run extensive part-time programmes for working adults, one of the paradoxes is that it is difficult to obtain statistics on the age of students and the numbers and profiles of part-time students. This lack of data possibly reflects both the state of the statistical database of the system as a whole and also the lack of appreciation for the importance of age as a necessary social category to assist planning. At UWC over the last seven years there has been ongoing advocacy to recognize this but such data is still not presented as a matter of course. While this may be indicative of the resilience of 'youth culture' that pervades higher education, the demographic reality in the country is that 45 per cent of people are under 19 years of age and there is high youth unemployment.

The issue of age also raises the important definitional question of lifelong learning. Often lifelong learning is equated with adult learning and it does not emphasize the second part of the definition within the Cape Town Statement which relates to 'developing lifelong learners', which is critical to the education of students of all ages. At UWC there has been a tendency for advocacy of lifelong learning to be weighted towards those who are older, working and part-time students. As Candy *et al.* (1994) elaborated in their research, the curricula and the pedagogy used for all students either aids or hinders the possibilities for developing lifelong learners. It is therefore important to challenge the notion that lifelong learning is only relevant to 'older', 'mature' or 'non-traditional' learners.

Financial frameworks

In several countries, there is the paradoxical situation that there is acceptance of lifelong learning as a preferred approach, but the national frameworks for funding and student loan schemes work against part-time or older learners, and by implication, women. The main student financing schemes tend to discriminate against some groups of non-traditional students and modes of study. Examples are the age ceilings in countries such as Germany, where generally students above 30 are no longer eligible for financial support. After campaigning for access by part-time

students, the South African financial aid system opened to them in 2003. There is an assumption in many institutions that adults will be able to afford the fees. With unemployment in South Africa running at approximately 40 per cent, plus the neo-liberal economic policies that pass costs of health and education increasingly to the 'consumers', this is patently not the case. The limited financial support for part-time students is a major disincentive and no doubt influences successful completion of courses by students.

In South Africa the new funding formula for higher education is currently being introduced. We therefore have not yet experienced its impact directly. However, it is anticipated that certain features of the system may well work against part-time learners. There are indications that the Department of Education will limit the time to complete degrees and the norm they will use will relate to full-time students. In addition, they may be capping numbers in terms of headcount rather than full-time equivalency, which will dissuade enrolment of part-time and therefore adult learners. The fiscal constraints could well produce practices that seriously compromise the implementation of the lifelong learning policy.

In summary, the higher education environment in South Africa may not be particularly conducive to the realization of lifelong learning for 'non traditional' or older learners within the higher education system given the demographic profile, the traditional focus on younger learners and high status accorded to research institutions. However, the legacy of apartheid continues to highlight the political necessity of giving access to black women and men of all ages. The economy also demands that sufficient students are produced with the capabilities of 'lifelong learners'. This highlights the importance of ensuring that lifelong learning is not equated entirely with adult learning. Lifelong learning as part of the ongoing struggle for social justice within a highly unequal society, which is challenged by the HIV/AIDS pandemic, also continues to be promoted by activists. UWC has its historical roots in these traditions and this, against various other odds, contributes to an enabling environment on the one hand. On the other, however, the university finds itself severely constrained financially and will be seriously influenced by the way in which the funding formula is interpreted.

Strategic partnerships and linkages

The Cape Town Statement describes a lifelong learning HEI as well networked and having backwards, forwards and sideways linkages, back to schools, forward to continuing professional education, and out into communities, workplaces and families. It encourages mobility and interactions amongst different types of institutions and sectors (Candy *et al*. 1994). There is pressure from business and parts of government on higher education to transform to be more 'responsive' to its external environments. There are calls for partnerships to be developed between HEIs and various sectors in society at local, regional, national or international levels.

At UWC there are a range of innovative practices which connect the institution to 'the real world' in curricula terms and which build relationships with

communities within civil society, business, labour, or government. One innovative institution-wide strategy has been its high profile involvement in the promotion of the Western Cape Province as a learning region. This promotes the culture of life-long learning in the community at large (see Longworth this volume). It has both provided exposure for UWC as a lifelong learning advocate and it has brought it into closer relationships with government, other educational institutions, and civil society. UWC has been a leading proponent of the Learning Cape Festival that has helped to propel the initiative and promote lifelong learning on and off cam-pus (Walters and Etkind 2004).

There are of course many different relationships with local, national and inter-national organizations, sectors or movements, but the question is which of these are essential for the realization of a lifelong learning HEI concerned with equity and social justice?

Research

In the Cape Town Statement 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 focus for research activity in its own right. This would include ongoing institutional research. The framework foregrounds partic-ular notions of knowledge and knowledge production and begs the question as to what of the institution's research profile is particularly pertinent to its definition as a lifelong learning institution.

At UWC these debates have not yet been held. The most obvious aspects, which have been identified and monitored, relate to the study of lifelong learning more broadly, to policy, institutional and advocacy research. This aspect of the framework needs further elaboration.

Teaching and learning

The lifelong learner is central in the conception of a lifelong learning HEI. As the Cape Town Statement says, the institution focuses on curricula to support holistic, self-directed learning. It is concerned to ensure that student support, teaching and learning, and administrative mechanisms service this need appropriately and effectively. According to the findings of Candy *et al.* (1994) a lifelong learner would exhibit qualities or characteristics, for example, a repertoire of learning skills, information literacy, and so on.

Both staff and students would be encouraged to be lifelong learners, hence staff and student development is pivotal. A learning culture within the institution that rec-ognizes informal, non-formal and formal learning would be encouraged. Candy *et al.* (1994) argue that the attainment of these qualities derives from, amongst others, the methodologies that are used and the relevance of curricula to real life problems.

Teaching and learning in South Africa, as in many parts of the world, struggle to be recognized within higher education as a central concern. It is the research

profile of institutions that brings status. It is teaching and learning that are most in need of concerted attention if HEIs are to be transformed into quality lifelong learning institutions. UWC is no different. As a visiting colleague said, he found a paradox amongst many progressive academics in South Africa: 'Everyone wanted to talk about transformation, about redress, about restructuring, but almost no one evinced much interest in what actually went on in the classrooms even on their own campuses' (Wolff 2003: 7).

Recently at national level, the Higher Education Quality Committee has identified teaching and learning as a key area of focus. This may help give legitimacy to the struggles of activists and scholars within institutions who have been working hard to raise the status of teaching and learning. These activities are at the core of lifelong learning, therefore a key question is how can we ensure that quality curricula, methodologies, staff and student development practices and delivery strategies, can encourage students and staff to be effective lifelong learners? While it is beyond the scope here, there is much to learn from the academic and staff development literature (Volbrecht 2001).

Administration policies and mechanisms

When new policies are to be implemented, there is a truism that 'the devil is in the detail' and that transformation is dependent on changing administrative procedures and practices, which are social constructions that maintain a particular 'picture' of the institution. There are many examples where policies are contradicted by regulations or daily practices. Within HEIs there are many practices or procedures that conserve the institution and its culture.

At UWC we have experience over the last seven years of trying to obtain greater recognition for adult learners, part-time learners, learners accessing the institution through continuing education or resource-based learning, or through recognition of prior learning. We have used a marketing strategy focused both inwards and outwards, as part of these efforts. But in order to make headway on transforming systems, the Vice Chancellor, the Registrar as the head of administration, and other executive leadership are pivotal. A developmental agency, which works across the institution, with leadership and faculties, also seems critical. There needs to be the political will to drive change at both the institutional and national levels. At the institutional level progress has been made within micro-organizational practices to align to the lifelong learning mission. It requires constant vigilance and intervention to align policies with procedures.

Student support systems and services

Lifelong learners require appropriate guidance, counselling and support at their different ages and stages of life and careers in order for them to become successful learners. In many instances services are geared to full-time young students even though, as at UWC, an average student is a woman aged 27 years old. Questions

about the range of services and their appropriateness to the full range of students need to be asked. Should counselling services, for example, assist with marital or child rearing issues; with mid-career changes; with unemployment and its effects; with financial management? Do we understand how adult learners mobilize support for themselves and what they need from the institution to assist them?

At UWC where the climate has historically been politically charged, often students' support has been framed largely in political rather than pedagogical and developmental terms. This has limited the possibilities for quality student development and support, which is integral to good teaching and learning practices. However, there has not been in-depth questioning of what student development and support may mean for part-time and older learners. The full-time students are very much the norm. The climate is beginning to shift as concerns with quality provision to part-time students are being raised and it is not possible, because of expense, to duplicate services. This is forcing the institution to begin to pose the questions about what quality alternatives may be.

In closing

Realizing a lifelong learning higher education institution requires clear political will at the national, organizational and individual levels. This is because organizational changes at the macro, meso and micro levels are so intertwined. As Bourgeois *et al.* (1999: 199) state, there needs to be a combination of 'successful actor strategies in decision- and policy-making', and 'conducive conditions related to organizational structure and context'. This is illustrated in the UWC case where it both affects and is affected by its environment.

Change is needed from international and national policies, through institutions, into the learning/teaching relationships. The framework within the Cape Town Statement provides a very useful way of unpacking what lifelong learning within an HEI may mean 'on the ground'. It identifies that major changes are needed on all levels and it emphasizes the critical need to read the context in an ongoing way to assess whether or not conducive conditions prevail. Several of the characteristic elements do need to be developed further in order to make them of greater practical value within varying contexts.

The Cape Town Statement suggests by implication that realizing a lifelong learning HEI may also entail the creation of a new discourse in which lifelong learning, rather than, for example, that of 'academic development', 'adult education' or 'continuing education', is the dominant frame and this entails important shifts in identity, epistemology and power relations, including the complex interplay amongst them (Volbrecht 2001). The working definition of lifelong learning also requires continuous negotiation. The strong impetus internationally to equate lifelong learning mainly to market needs ensures that there is constant political and pedagogical work to realize practices that emphasize both micro pedagogical relationships and their link to macro socio-economic and political locations of the institutions and actors.

Lifelong learning within an emancipatory narrative is concerned with social justice and active democratic citizenship amongst groups who are 'marginalized' within particular societies. In many instances the opportunities for 'non-traditional students' to participate mean that, for example, women and black, rural, working class, older or physically disabled people are gaining access to learning opportunities and acquiring lifelong learning capacities. Realizing a lifelong learning higher education institution is therefore very much about organization, pedagogy and politics, which requires, as Bourgeois *et al.* (1999) argue, a combination of successful actor strategies and conducive conditions related to organizational structure and context.

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