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**Practitioner and institutional perspectives on
lifelong learning at a South African university**

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A minor dissertation presented in partial fulfillment
of the requirements for the award of the degree of
Master of Education in Adult Education

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This work has not been previously submitted in whole, or in part, for the award of any degree.
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ABSTRACT

This research explores how the term ‘lifelong learning’ is understood at a higher education institution in South Africa. The study is built around a case study at the University of Cape Town (UCT). The research questions posed were: What are the different understandings of ‘lifelong learning’ at UCT? And secondly, what factors have shaped the development of these different understandings of ‘lifelong learning’?

The thesis approaches the research questions from two angles: What people working in the institution say about the topic and what can be read from the official University documentation on the topic. Continuing education work is used as a general proxy for lifelong learning as the term itself did not prove to be a useful identifier of specific educational activities at UCT. In analysing the data, two inter-related theoretical frameworks are employed – thematic analysis of the interviews and a critical discourse analysis of the texts.

Some of the key pressures and issues facing institutions globally as well as specific local concerns are identified when setting the context. In the interviews, practitioners identified some of these contextual issues as factors influencing the development of continuing education: funding pressures, responding to socio-political demands for rapid student throughput while also widening access, and the particular character of the institution.

The literature reveals some common approaches to lifelong learning – identified as economic, humanistic and social discourses – which were used to engage the perspectives of practitioners working on continuing education programmes. Based on an interpretation of the data, this thesis argues that in practice, the distinctions between the discourses tend to blend or transform. The economic and humanistic discourses begin to merge, as an individual’s motivations cannot be neatly categorised as either learning for work or learning for personal development, pointing to the emergence of a new discourse. In the case of the social discourse, the more widely used definitions of social responsiveness embrace economic (and political) imperatives, while also maintaining a development and democracy agenda. Instead of seeing the data as only revealing what exists, the analysis argues that emerging discourses themselves help to create new realities.

The thesis suggests that the institution is in a constant process of being shaped by many external forces and changed by agents engaged in creating new social practices. Using the concept of a ‘community of dissensus’ (Readings, 1996; Delanty, 2001), the multiple perspectives from the practitioners and the official documents captured by this research make evident the contested nature of the University’s institutional identity around lifelong learning.

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University of Cape Town

CHAPTER 1

1. CONTEXT

1.1 Introduction

Entitled *Practitioner and institutional perspectives on lifelong learning at a South African university*, this thesis deals with a two-part research question. The first question is: What are the different understandings of lifelong learning at the selected university? And secondly, what factors have shaped the development of these different understandings of lifelong learning?

This chapter sets the context for the investigation of lifelong learning at a South African university. Firstly, my particular location as the researcher in relation to this topic is explained. Thereafter, the chapter offers a brief orientation to the University of Cape Town (UCT), where the study takes place. Then the chapter provides a summary of the major pressures and changes facing higher education globally. This discussion is taken further by identifying particular tensions arising in the South African context given the country's history and socio-economic realities.

1.2 Research context

I selected the topic and site of the study for two reasons: Firstly, as the researcher, I have a professional interest in the topic. I am a staff member in the Centre for Open Learning (COL) working in the field of continuing education at UCT. The Centre for Open Learning was founded in 2005 and its goals are outlined as follows:

- to make the academic resources of the Institution accessible to a wider range of participants and to enable the Institution to become more socially responsive;
- to facilitate networking and partnerships between external stakeholders (e.g. government, business, labour), educational providers and UCT academic staff related to the offering of educational programmes;
- to build capacity of staff to work with adult learners and flexible modes of delivery;
- to facilitate improved throughputs and student mobility; and
- to generate income for the University from the activities of the COL (2004a).

The notion of lifelong learning occurs in the early founding documents of the Centre for Open Learning, and how this notion is interpreted at UCT directly affects the nature of the work I do. UCT provides an interesting case study because the University does not have a history of easy access for adult learners, nor does it currently provide many opportunities for continuing education or part-time study. But, there is increased interest in continuing education and lifelong learning, and substantial institutional investments

(such as the establishment of the Centre for Open Learning) which indicate that there are shifts taking place in the practices of the University.

Secondly, I have a personal interest in lifelong learning. I returned to study after a break of 16 years, and found the experience of being an adult learner more meaningful, in that I was able to apply new learning immediately to real-life situations.

From this personal experience, I have become convinced of the value of providing access to continuing education opportunities for people throughout their lives – even though other responsibilities they have make full-time traditional study difficult.

My access to and interpretation of data is therefore deeply affected by this proximity to the site and the topic – which is both a positive and a negative factor in the research process, and will be taken up further in Chapter Three.

1.3 Research site

The site of the research, the University of Cape Town is the oldest of South Africa's higher education institutions (having been founded in 1829), and represents, in many ways a traditional 'academy' with an emphasis on academic quality and excellence. While the higher education landscape in South Africa is not coded as it is in some countries (e.g. the 'Ivy League' of the USA and the 'Oxbridge' of the UK which have the reputation as the most prestigious universities), there are still distinctions. UCT is one of a handful of 'historically advantaged' higher education institutions in South Africa, as it was generously resourced first by colonial administrations and later under the Apartheid government while being racially restricted to white student enrollment. Although no longer an exclusively 'white' institution, UCT is still viewed as one of the most prestigious universities in the country. It generally has good facilities, well-qualified lecturers and internationally recognised researchers. Today UCT remains a government-funded university (termed 'public'), but as with trends world-wide, there is less generous funding from government for higher education than in past years (see section 1.4.2.).

UCT is an English-medium university offering degree programmes across six faculties: Commerce, Engineering and the Built Environment, Health Sciences, Humanities, Law and Science. More than 70% of students at UCT are enrolled for undergraduate programmes – most of them enrolling as school leavers.

UCT defines itself as a medium-sized research-led contact university (CHE, 2006). This definition uses terms which have a great deal of significance in the higher education arena and for this research project. Each phrase represents a strategic choice which UCT has made.

- 'Medium-sized' is defined as below 20 000 students. UCT's current student population is 'about 22 300' (CHE, 2006:10). The medium-sized label is seen to allow a quality learning experience.
- 'Research-led' is about increasing the focus of academics on research which, it is argued will better inform their teaching. It means increasing the post-graduate enrolment rate (CHE, 2006: 32).
- 'Contact' is distinct from a distance learning institutional model in that UCT wants to ensure that each student has quality contact with academic staff (CHE, 2006)

While this description of UCT is freely used in the current context (for example, in the Council for Higher Education's Audit report Executive Summary, 2006), it is also apparent that this is a reality which the University is *hoping to create*. 'We create our world with words', according to (Maykut & Morehouse, 1994:18) much like the 'world on paper' which Gee *et al.* (1996) argue that the new business texts are creating about the changing workplace.

(These texts) create on paper a version of the new work order that their authors are trying hard to enact in the world ... How we think and write about the world has a great deal to do with how we act in it and thus, what it becomes in reality (Gee, Hull & Lankshear, 1996:24–25).

The *Vision 2001 and Beyond* document (Ndebele, 2000) sets out a 'wish list' for UCT which includes, for example, 'Consolidating UCT's research identity' as point number two. The key priorities outlined for the University are based on an assessment that some of these identities (for example, being a research-led institution) *do not yet exist*. In line with its mission *to become a research-led institution*, UCT's *strategy* is to increase the ratio of postgraduate students in relation to undergraduate students, (CHE, 2006, 32).

While in Chapter Five, there will be a deeper discussion of the way in which the University represents itself, it is important to note here that there is an extent to which social institutions will always be in a state of change or transition since they express the contradictions and conflicts of broader society (Castells, 2001b:206). Thus UCT has an existing identity, but, there are shifts (albeit uneven) taking place in both the identity and activities of the Institution which are explored further in Chapters Four and Five. It would be naïve to believe that any kind of change is linear and smooth – higher education institutions (HEIs), as Kulati (1998) argues, reflect inherently contradictory drives; they may be the source of great innovation and lead change, while other parts of the *same* institution will resist change. Other writers (such as Moore and Lewis, 2002) have suggested that, when assessing organisational change it is important to consider the specifics of an institution taking into account 'contextual conditions, institutional capacity and institutional culture' (Moore & Lewis, 2002:17). The considerations of institutional culture and context are picked up as themes in Chapters Four, Five and Six.

1.4 The social context

In this section I will discuss Higher Education in a global context and Higher Education in South Africa. In my discussion of Higher Education globally, I will focus on the key areas of knowledge production and application, and training for a skilled workforce. In the discussion of Higher Education in South Africa, I consider equity, redress and excellence; questions of adult learners and access; economic productivity and social responsiveness and institutional culture and identity.

1.4.1 Higher Education globally

Globalisation is cited as a significant influence on all aspects of the modern world (Kumar, 1995; Castells, 2001a; Becher & Trowler, 2001; Delanty, 2001). The term refers to the increasing integration of the world economies and the reduction in the significance of the nation-state (Delanty, 2001:117). Higher Education is not exempted from the effects of globalisation, and there are similar changes taking place to varying degrees in many different countries (Becher & Trowler, 2001). To start the discussion, I think it is useful to consider Castells' (2001b) outline of the roles played by the university historically. In brief, he sees these as being the transmission and generation of ideology; the selection and formation of dominant élites; the production and application of knowledge and training a skilled labour force (Castells, 2001b:206–210).

However, globally there are shifts taking place, bringing about quite fundamental changes to some of those traditional roles. The shifts which have direct impact on the field of the study (lifelong learning) in this thesis are most notable in relation to the roles of knowledge production and the training of a skilled labour force. I will now discuss how these two roles identified by Castells (2001b) – knowledge production and application and the training of a skilled labour force – are fulfilled by universities in contemporary times.

1.4.1.1 Knowledge production and application

Knowledge production, or generation, probably defines universities beyond any other characteristic – 'knowledge is the core business of higher education' (Scott, 1997:19). But, in the context of the technological revolution, the position of universities as the dominant knowledge producers has been weakened, and they have become '... only one knowledge producing agency among many' in the new economic order where knowledge and information are the key resources being traded (Gibbons, Limoges, Nowotny, Schwartzmann, Scott & Trow, 1994).

The widely accepted thesis developed by Gibbons *et al.* (1994) is that there has been a radical shift in the 'modes' of scientific knowledge production. Under the 'old' or more traditional model ('Mode 1'), it is theoretical work in the universities and scientific laboratories that leads to breakthroughs in new knowledge which can then be adapted to use in commercial or social contexts. However, Gibbons *et al.*

argue that there are far more incidences of knowledge production taking place now in applied contexts ('Mode 2'), by teams of inter-disciplinary experts which are judged to be of immediate value to society (whether this is public good or commercial profit). Universities, which in the past operated purely as 'Mode 1' knowledge producers, are being 'forced' to adapt to the new conditions mainly through funding pressures. Applied, or 'Mode 2' knowledge production, is seen as more desirable to government and the business sector since it is used to address immediate social problems or turned into economic gain.

All over the world, reduction in state subsidies to higher education is placing greater pressure on the universities to seek funding¹ through business or corporate partnerships (see for example Subotzky, 1999; Muller, 2003; Muller, 2001 discussing the 'enterprising university'). In South Africa, there are strong local political pressures on universities to address the 'problems and challenges' of the country as well as broader African society, while still maintaining 'international standards of academic quality' (Scott, 1997:19).

The erosion of this unique role of the University, and casting higher education as *one* of the many sites responsible for knowledge production has brought about profound shifts in the operational culture of universities (Delanty, 2001; Duke, 2002; Gibbons *et al.*, 1994; Becher & Trowler, 2001). Universities now have to compete in the educational market place to attract students, and to earn contracts to fund research which must be shown to be relevant and to serve particular constituencies (Becher & Trowler, 2001). Universities are also having to show results for the investment of money by government (for example, more questions are posed about the 'throughput of students' and the 'output of research'). Funding pressures force institutions to look for new sources of income – one of which has been the discovery of continuing education as a potentially lucrative income stream. World-wide, tertiary education institutions now compete with one another for students and new private sector initiatives in education force academics to 'market' their courses (Johnson, 2003). The language being used has shifted from core concerns about the pursuit of disciplinary knowledge to terms which have a flavour of entrepreneurship, managerialism, and accountancy (Usher & Solomon, 1999; Readings, 1996).

1.4.1.2 Training for a skilled workforce

In the past universities produced the professional class of state bureaucrats, but over time have come to serve the needs of the modern economy, producing engineers, lawyers, doctors and other professionals (Castells, 2001b). In the new economic order of 'informational capitalism' (Castells, 2001a), the emphasis in tertiary education is on learning how to adapt knowledge to new conditions. It is increasingly recognised that the only way of improving work performance is to be part of a process of continuous learning (Guile & Young, 1998 b). There is increasing political and economic interest in promoting all forms of continuing education to equip the workforce with the new skills needed. Continuing education

¹ Notably, two out of the 10 goals outlined in *Vision 2001 and Beyond* document relate to financial security. Point 3: Growing innovation and profiting from research & point 8: securing financial stability for UCT.

and continuing professional development courses are generally easier to develop and run than mainstream degree programmes (being of shorter duration and having less demanding assessment regimes), and they are seen as one way in which the sector can capture the growing market for lifelong learning in response to workplace changes. Universities world-wide are responding to pressures to provide education which is more flexible and accessible, and more responsive to workplace needs.

British adult education specialist Chris Duke has noted the global trend whereby the term 'extra-mural' is going out of fashion, while concepts such as 'outreach', 'distance', and 'open learning' are gaining currency as 'all are in principle modes of enhancing access to educational institutions and provision in non-traditional ways' (Duke, 1989:165). In the next section, more focus is given to the particular conditions facing higher education in South Africa.

1.4.2 Higher Education in South Africa

While higher education everywhere is going through major changes, the particular history and socio-economic conditions in South Africa have thrown up some special challenges for higher education generally, and the University of Cape Town in particular. The social transformation of the country since 1994 has had a profound impact on the education sector and has led to major reforms being introduced. But even the reform process is driven by contradictory pressures, summarised as follows.

... between equity to redress the huge inequalities of Apartheid and productivity in meeting national economic human resource development needs to compete in the global economy – the modernization and skills agenda; between levels in the education systems – early years and schooling, further education and training, adult basic education and training (ABET), and higher education; between expanding the size of the higher education sector and enhancing its quality and efficiency (Duke & Jones, 2005:12).

Since 1994 successive legislative tools have created the infrastructure for a single qualifications framework (the National Qualifications Framework) intended to 'improve flexibility, mobility and access to education and training' (CHE, 2001:12). Its vision is to offer better lifelong learning opportunities 'for moving between different types of qualifications (especially between general and vocational) and promoting links between formal and informal learning, thus providing opportunities for people to use their informal learning to obtain recognized qualifications.' (ibid:12)

Contextually it is important to understand that, while on paper, since 1995² South Africa has had an integrated education and training system, in reality, tertiary education has engaged with the National Qualifications Framework (NQF) in a very different way from the training sector (Moore & Lewis, 2002). Higher Education qualifications are pegged on the NQF but are mostly recognised as complete programmes with their outcomes specified as exit-level outcomes. This is in contrast with the unit

² The South African Qualifications Authority Act was passed in 1995.

standard-based approach of many workplace learning programmes which are intended to allow learners to accumulate credits over time to form a qualification. There are competing visions about how exactly the University *should* engage with the policies (Moore & Lewis, 2002), but many influential higher education commentators express grave concerns about whether disciplinary knowledge could ever be broken up into ‘bite-sized’ units to be somewhat randomly combined as envisaged by the unit standard-based approach to building up qualifications (see for example Moore & Lewis, 2002; Barnett, 1994; Muller, 2000; Kraak, 1994; Ensor, 2003).

Rising out of segregated education, different configurations in the higher education sector have been designed to rationalise the supply of educational services (the ‘size and shape’ debate) and to transform the old racially segregated institutions ‘ensuring the student body reflects the realities of the broader society’ (Duke & Jones, 2005:16). In an attempt to rationalise the duplication of Apartheid era educational provision, the Ministry of Education’s National Plan for Higher Education, 2001, dramatically reshaped the higher education landscape³ by enacting regional mergers and creating ‘new’ universities of technology. UCT was not directly affected by the mergers, but there has still been considerable pressure for change at an institutional level as part of the drive to transform higher education in South Africa. An emphasis on greater ‘responsiveness’ underpins the new policies – which refers to the dual imperatives of increasing South Africa’s global economic competitiveness and for social reconstruction and equity (Moore & Lewis, 2002; Walters, 2006; Aitchison, 2004).

I will discuss some of the pressures as they have direct relevance to the research question in relation to universities generally, and specifically to the case study, UCT. I have grouped the pressures as follows: i) equity, redress and excellence; ii) adult learners and access questions; iii) economic productivity and social responsiveness and iv) institutional culture and identity.

1.4.2.1 Equity, redress and excellence

The National Plan for Higher Education expects HEIs to actively ‘promote equity of access and fair chance of success to all who are seeking to realise their potential through higher education’ (Favish, 2003).

In terms of redress of the past inequalities, there have been some shifts across the entire sector, with the percentage of black students *enrolled* for higher education rising from 29% in 1988 to 60% in 2000 (Duke & Jones, 2005:13). This shift is even more dramatic at UCT, where the number of black students registered rose from 7% in 1988 to 50% in 2004 (Scott, Yeld, McMillan & Hall, 2005:281). However, the success rate of these students is not always assured, since they are operating from a position of educational disadvantage (Scott *et al.*, 2005:264). During the 1990s, debates emerged about the implications of admitting poorly prepared learners for the quality and standards of education (see for example Scott, 2003).

³ The country’s 36 public universities and technikons were reduced to 24 through mergers.

For a university like UCT, where the mission includes a commitment to being ‘a world-class institution’, the tension is a real one. The University is seeking to compete with international benchmarks in higher education achievement, while also aiming to widen access to educational opportunities for those who were previously disadvantaged. By admitting students who have the potential to achieve, but inadequate preparation due to poor schooling, may mean that completion rates are slower. This does not fit well with the revised government funding package which provides financial support to universities based on the *graduation* or *completion* of a student, and no longer only on their registration (Moore & Lewis, 2002; Duke & Jones, 2005).

This discussion about equity, access and excellence provides important background information for the analysis of the data in Chapters Four and Five.

1.4.2.2 Adult learners⁴ and access questions

Of special interest in this thesis is the way in which higher education views lifelong learning – that is, how institutions make educational opportunities available throughout a person’s life. Traditionally universities were viewed as finishing schools (Duke, 2002), seen as the final preparation for life and work. However, linked to the changes described above, life and work in the 21st century demand that in order to survive the rapidly changing environment, education has to be an integrated and continuous or lifelong process. In South Africa, however, serious engagement with the adult learner constituencies by higher education is complicated – the new language of skills development, which includes continuous upskilling of workers and concerns of redress to give those previously disadvantaged by Apartheid the chance to gain formal education, mingles with strong pressure to get the maximum number graduates out of degree programmes and to focus on school leavers in the face of a severe youth employment crisis (see for example, Duke & Jones, 2005).

One possible avenue that can be explored to address the critical skills shortage is to harness and upskill currently employed adults. The National Plan for Higher Education (2001) specifies that there should be emphasis on providing higher education to workers, mature learners and the disabled, whom it is suggested could play a ‘significant role’ in addressing the skill shortages, at least in the short term (Department of Education DOE, 2001). However, there has also been grave concern expressed about the poor rate of ‘retention’ and ‘throughput’ in higher education – and adult learners generally take longer to complete (since they usually have to study part-time) and have a higher dropout rate (because they are usually juggling multiple responsibilities).

In an interesting series of studies on adult learners in public higher education institutions commissioned by the Council on Higher Education, these studies revealed that the institutions all experienced similar difficulties with adult-learner-centred programmes (Buchler, Castle, Osman & Walters, 2007). The major

⁴ By adults, I mean people generally over the age of 23 who are working or have responsibility for family maintenance and who are not proceeding straight into university studies from school.

factors inhibiting the successful development of programmes aimed at adult learners identified by the study included:

- the absence of a coherent institutional strategy for adult learners;
- changes in the government's funding formula;
- the amount of work/labour/time required to mount good adult learner programmes (often requiring after-hours support work);
- the new emphasis from government on student retention and throughput (rather than increasing access) (ibid: 27).

The research team did stress that, despite the commonalities, there were very different *approaches* taken by the institutions which depended on the 'distinct history, identity, mission and relationship with its surrounding communities, shaped by its position within the South African and provincial higher education landscapes' (Buchler *et al.*, 2007: 27).

What is significant for this thesis is, that while the universities are being urged to improve access to those previously disadvantaged (and in addition to adult learners specifically), the funding formulae militate against this. By funding universities according to the graduation of students, the state is looking for rapid throughput. Universities then look at student admissions based on those most likely to graduate as quickly as possible. And, generally, those will not be adult learners.

1.4.2.3 Economic productivity and social responsiveness

Producing a highly-skilled workforce has been identified as a key factor in surviving the fierce competition of the globalised economy (Kraak, 2005; Macun, 2001; Isaacs, 2004). The demands of 'flexible specialisation' (Castells, 2001a) require a new kind of education, and universities are under pressure to change the traditional curriculum which has been regarded as too 'theoretical' or removed from the realities of the world of work. Thus, on the one hand, with the dawn of the 'knowledge society', tertiary level education is being called upon to develop the highly skilled cadre of workers needed to operate the new economy. On the other hand, South African universities are also being urged to address the critical developmental needs of the country – namely, poverty and inequality (Favish, 2003). Universities are now challenged to ensure that they develop programmes that deliver 'professional and knowledge workers with globally equivalent skills, but who are socially responsible and conscious of their role in contributing to the national development effort and social transformation' (DOE, 2001). The multiple roles being given to universities demand that they service both the economic functions and social/civic functions of education – termed by UCT's Martin Hall, 'socially responsive education' which has both a private benefit (to the individual student) and contributes to the 'public good' (Hall, 2003:2).

1.4.2.4 Institutional culture and identity

While the macro- or socio-economic factors which have been sketched out are clearly having an impact on individual institutions, it is essential not to forget about the internal life of the institution itself.

Kulati (1998) argues that an institution may not have a commonly defined 'culture' – which he describes as 'the set of symbols, beliefs and values that are perceived by members of an institution to define the character, mission and purpose of that institution' (Kulati, 1998:2). He suggests that there can be multiple definitions of this 'culture' within a single institution and may include 'subcultures and counter-cultures' (ibid: 2). And, traditionally, academic institutions have been structures of diffuse power, with authority being carried at lower levels of the institution – such as in departments, units or even by individual academics. In discussing the impact of policy on institutions, UCT education scholar Johan Muller points out that 'institutionality is inscribed in people and practices, and these do not necessarily change with changes of curatorship' (Muller, 2001:13). This understanding of large, established institutions (such as UCT) – the extent to which they are composed of individuals and historically developed practices – informed my choice of research methodology, which was looking for the multiple 'voices' or 'practices' around lifelong learning.

The University of Cape Town's particular history and location are important influences on how the Institution chooses to deal with the tensions and pressures outlined in the preceding pages, and will be referred to again in Chapters Four and Five.

1.5 In summary

This chapter has outlined the context of the study. I noted that UCT provides an interesting case study for the examination of lifelong learning in that it is an established institution with academic standing, but it is dealing with a range of transformation challenges stemming from the local and global environment. I asserted that social institutions are always shifting in response to the contexts in which they are embedded, but simultaneously, the institutions are also creating new identities for themselves – attempting to make the new 'worlds on paper' become a reality (Gee *et al.*, 1996:25). I will explore this idea – of how different perspectives within the institution are shaped and in turn shape the institution – more fully in Chapters Five and Six, as I deal with the two research questions in greater depth. The data gathering and analysis identifies different understandings of 'lifelong learning' at UCT, and looks for factors that have shaped the understandings of 'lifelong learning'.

Choosing to put the term 'lifelong learning' at the centre of the research focus has meant that the thesis has to engage with the widest definitions of adult education. In the next chapter, Chapter Two, the reader is introduced to the many interpretations given to this conceptually contested term within the broad field of adult education. The methodology used for the research is outlined in Chapter Three. Two types of data are dealt with: in Chapter Four, primary data from interviews is analysed, while in Chapter Five, formal

documents from UCT pertaining to 'lifelong learning' are analysed. In Chapter Six, there is an attempt to lace together these analyses to draw out answers to the research questions.

University of Cape Town

CHAPTER 2

2. WHAT IS LIFELONG LEARNING?

In this chapter, the broad field of study, 'lifelong learning' will be introduced. The main purpose of this chapter is to review some of the key literature on lifelong learning so as to reach a working definition for the remainder of the thesis. As a starting point, I outline the development of the term briefly. Then, the language is unpacked in order to identify the philosophical roots and social drivers which have given rise to the popularisation of the concept. This section will isolate some of the key 'discourses' (ways in which the language creates social identities, meanings and relates to social practices (Gee, 1996)) which will be carried through the analysis of the data in later chapters. Finally, some time will be spent outlining how lifelong learning has been interpreted in the higher education context globally and in South Africa.

2.1 Defining lifelong learning

Edwards (1997) tackles the question of defining lifelong learning by arguing there has been an enormous blurring of boundaries, meanings and differentiation, which has created a diverse 'moorland of lifelong learning' (ibid: 67). The concept of 'lifelong learning' is in everyday use, both in the educational literature and the wider society. But why the term has 'caught on' is an interesting question. Perhaps its alliterative grammar has appeal – for the term does have a ring of rhetoric to it. It conjures up ideal images of the pursuit of knowledge for all purposes by all people at all ages. And, like terms such as human rights and social inclusion, 'it is difficult to be against it' (Edwards, Armstrong & Miller, 2001:418). It has the air of being a 'good idea', but, there are very different understandings of what it means conceptually, and, in practice.

2.2 From adult education to lifelong learning

The term 'adult education' engages a specific focus on education for people other than children and youth. In the past, education was seen as a necessary *preparation for life* – education was a fixed term period that had to be *endured* and *given up* when adulthood was reached – then real life was thought to begin (Merriam, 1995:32). The modern world demands a completely different approach – 'education is life' not a preparation for life, so lifelong learning is a more appropriate description of what is experienced in modern society.

Over time there has been a gradual drift from the use of the word 'education' to 'learning'. Edwards (1997) suggests that the blurring of the boundaries between 'education' and 'learning' is reflecting a much bigger social trend in the collapsing of the formal institutional boundaries. Edwards argues that, until now, one of the hallmarks of the modern world has been differentiation – laying out boundaries for organising and

allocating responsibilities. The 'blurring of boundaries' (Edwards, 1997:70) reflects the growing complexity and crossing of geographical and time boundaries possible with new technologies, which undermines the logic of these bounded/differentiated methods of organising.

However, Duke (2002) cautions that it is very problematic to interchangeably swap 'learning' and 'education'. It implies that 'learning is only seen in terms of formal provision' (Duke, 2002:9). He points to the danger of equating 'learning' with 'education' because it immediately reduces the broad sphere of learning which should include experiential learning, tacit learning, or any form of learning taking place outside of the classroom. From a different perspective (Salling Olesen, 2004), points out that exchanging 'learning' for 'education' can challenge the formal sector's control over knowledge (through education). Lifelong learning can be used to promote the concept of 'learning' as a way of embracing knowledge created in many other (often more applied or informal) settings (Salling Olesen, 2004:13).

At this point, it might be helpful to sketch a 'biography' of the term 'lifelong learning' before delving further into the meanings and interpretations.

2.3 Where and when did the term arise?

In tracing how the term came into being, some commentators suggest Plato to be the originator (Rubenson, 2004:29); others see Dewey as the 'philosophical founding father' of the lifelong learning movement⁵ (Jarvis, 1987:79). Dewey's approach to working with adult learners was based on the belief that education is concerned with growth, and so education is 'naturally' lifelong since humans are capable of growing intellectually throughout their lives. He tried to promote the idea that adult learning and school learning should be seen as on a continuum. Even though Dewey's ideas sounded a lot like lifelong learning as it is espoused today, most of the writers reviewed (Rubenson, 2004; Duke, 2002; Field, 2006) agree that the term came into popular use in the policy arena only during the 1960s. About that time, the Organisation for Economic Co-operation and Development (OECD) and the United Nations Educational, Scientific and Cultural Organisation (UNESCO) introduced lifelong learning as a guiding principle for restructuring education. However, the term fell out of use for another decade or so, only to be highlighted again in the mid-1970s – most notably through the UNESCO 1972 report entitled *Learning to be*, which promoted a humanistic concern with the availability of education throughout life for individual fulfilment (Field, 2006:13). In the 1990s, UNESCO's slogan was *Lifelong learning for all*, and in 2000, the Lisbon European Council confirmed that lifelong learning was a 'basic component of the European social model' (Rubenson, 2004:28).

⁵ Dewey believed that all adults would learn throughout life if their earliest education had 'sown the seeds for continuity of the learning process' (Jarvis, 1987: 81).

Rubenson (2004: 29) suggests there were at least two 'distinct and fundamentally different paradigms of lifelong learning,' operating in Europe and developing out of particular historical conditions. The paradigms are the 'first generation: humanistic' paradigm (which he locates as emerging in 1960s) and the 'second generation: strongly economic' paradigm (traced from the mid-1980s). While there is some debate amongst commentators as to when the 'economic paradigm' came to dominate, there is consensus about the new importance placed on the value of knowledge in the global economy from the end of the millennium (Rubenson, 2004; Edwards, 1997; Field, 2006; Castells, 2001a).

Use of the term 'lifelong learning' has gained wide currency, particularly in policy circles around the world. However, Field (2006) points out that, although the term, 'lifelong learning', can be found even in serious research and academic work, often it is used to mean, simply, adult learning. He argues that although the terminology of lifelong learning has been adopted, there is often little sign that authors have actually shifted their conceptual frameworks to incorporate any new ideas. 'The educational result is a kind of linguistic hyperinflation, in which the term is constantly devalued, to the point where it might become intellectually worthless' (ibid: 3). Despite this comment, Field argues that there is still a point to keeping the term. Lifelong learning is reflecting a new trend, and this would probably explain why it has been so willingly adopted across countries and sectors in the last few decades. Any observation of society will show that 'continual learning has become a key defining characteristic of modernity' (ibid: 4).

Field (2006) asserts that lifelong learning is not simply about economic drivers; changing social, cultural and political conditions are also feeding the popularisation of the ideas around lifelong learning. Having provided a brief overview of how the term emerged historically, the next section will focus on language and discourse to further explore the term conceptually.

2.4 The language and discourse of lifelong learning

Given its range of meanings, the approach of critical discourse analysis offers a way of reaching a working definition of lifelong learning by interpreting the actual language used (Gee, 1990; Fairclough, 1989; Mesthrie, Swann, Deumert & Leap, 2000). When choosing to focus on text or words, it must be borne in mind that 'words have no meaning in and of themselves and by themselves apart from other words' (Gee, 1990). Critical discourse analysis requires the researcher to approach text as a discourse which constructs meaning about those things of which it 'speaks' (Cameron, 2001). Theorists from this perspective would see education, training and lifelong learning as social practices which means they are activities 'defined, delimited and constituted through narrative processes' (Edwards, 1997:5; Gee *et al.*, 1996). For example, Edwards suggests that the *meaning* being given to adult education is being rewritten through the use of the term 'lifelong learning' (Edwards, 1997:75). From this perspective, the assumption I will be working with is that there is no 'true' or 'correct' definition of lifelong learning (Aspin & Chapman, 2000); I will explore how the term has been used and given meaning in various

contexts. I will present a ‘working definition’ as one possible interpretation of meaning of the term, lifelong learning.

A simple textual analysis can be used to delve a bit deeper; there are two dimensions to the term ‘lifelong learning’: the *time dimension* (lifelong), as in ‘from cradle to grave’ (Abukari, 2005; Gustavsson, 1997) and the *content dimension* (learning) and in this dimension, there are contested notions (Aspin & Chapman, 2000; Abukari, 2005; Coffield, 1999; UNESCO, 2000; Volbrecht & Walters, 2000; Wain, 1993).

In texts on definitions of lifelong learning, many authors look at the approaches underpinning the term ‘learning’. While common strands emerge (namely learning directed towards economic concerns, social or citizenship concerns and individual growth) they are named and grouped differently, for example, three ‘elements of lifelong learning’ by Aspin and Chapman (2000:17); or three purposes which ‘learning was directed towards achieving ...’ Abukari (2005:143). Rubenson (2004) in section 2.3., identifies two ‘paradigms’ (humanistic and economic) of understanding lifelong learning as he traces the history of the term’s emergence – and then looks at three different institutional models of lifelong learning (the state, the market and civil society (ibid:33). South African academic, Shirley Walters, lists similar strands clustered into two ‘traditions’: social justice, human development and democratic citizenship on the one hand, and human resources or human capital development on the other (see Walters & Watters, 2001a:471; Walters, 2006:10).

In representing and engaging the debates on lifelong learning, I have chosen to focus on three discourses – economic (human capital); humanistic (individual/personal growth) and social (citizenship, democracy) – to organise the discussion of the language and ideas underpinning lifelong learning.

2.4.1 Economic discourse

It is strongly argued that the only way a nation or region can stay competitive in the modern world comprised of globalised knowledge economies is to invest in their human capital to ensure a highly skilled workforce (Castells, 2001a; Field, 2001; Gustavsson, 1997). Globally, many education policies reflect this increase in the predominance of the economic purpose of education – which means that learning must be primarily about equipping people for work. This discourse, or interpretation, of lifelong learning has been termed the ‘human capital school of thought’ (Gustavsson, 1997), or more crudely ‘human resource development in drag’ (Boshier quoted in Field, 2006:17). In this view, it becomes essential to the economy that: a) employees are good at learning since they will be required to gain new knowledge and skills to adapt to the changing work environment, and b) they internalise the desire for continuous skills upgrading. Education needs to create what Castells (2001a) has called ‘self-programmeable workers’, and to provide the ‘skills which are relevant for economic innovation and competitive advantage’ (Muller, 2000:71).

Often the language and ideas used in the policy documents developed to implement lifelong learning include the valorisation of ideal personal characteristics and a great deal of expectation of how new learners are to respond (Gee *et al.*, 1996; Aitchison, 2004). These are some examples from the South African policy documents highlighted by Aitchison (2004) (emphasis added):

- Lifelong learning is ‘a continuous process which *stimulates and empowers individuals* to acquire and apply the knowledge, skills and attitudes required to realize their full potential.’ (Aitchison, 2004:530).
- ‘... *learners must be equipped to take advantage* of open learning and multimedia education and training opportunities’ (Aitchison, 2004:524).
- ‘Though many adult learners have not previously been encouraged to develop as *independent, critical thinkers* through their schooling, it is essential the schooling system, including educare, and higher education, *inculcate the attitudes and competencies* vital for lifelong education’ (Aitchison, 2004:541).

The demands on the individual to fulfil the roles of model learner are considerable, and several authors draw attention to the danger that lifelong learning can be used as a mechanism for exclusion and social control (see for example Field, 2006; Edwards, 1997; Coffield, 1999; Castells, 2001a). They argue that those with the fewest skills and the least access to the continuous upgrading of their knowledge are now less likely to find permanent employment (Field, 2006:5; Castells, 2001a).

Several writers note a general trend in many government policy initiatives of shifting responsibility onto individuals in order to reduce social spending – whether for welfare payments, education, health or retirement (Martin, 2003; Field, 2006). Edwards (1997) outlines how, in the case of education, the responsibility has been moved from the state and educationalists, to the employers and the learners (now termed ‘consumers’). He argues that lifelong learning is now placed in a ‘discourse of economic competitiveness’ (Edwards, 1997:11).

Lifelong learning is being galvanised predominantly to equip individuals globally to compete ever more strenuously against each other in the market for qualifications, employment and other opportunities (ibid: 21).

While this section has stressed the strong economic emphasis underpinning much of the current discourse of lifelong learning, it is interesting how much prominence the individual focus is also given.

2.4.2 Humanistic discourse

The ‘humanistic tradition’ is based on the belief in ‘a universal ambition’ of people to develop their personal abilities (Gustavsson, 1997). In section 2.4.1 (on page 15), it was suggested that the economic imperatives of national (and the global) economies are being internalised by individuals who now take on

the responsibility to develop themselves to better serve their employers. But this is a simplification. There can be little debate about the increasing complexity of modern society, and even in the private domain, knowledge and information are tools every person needs.

Knowledge becomes the tools with which individuals negotiate the complexities of everyday life, from taxation (tax counselors) to unfair labour practices (shop stewards ...); from relationships (marriage counselors) and diet (nutritional knowledge) to health and consumption (consumer information agencies) (Muller, 2000:73).

It is this perspective which allows Gustavsson (2002) to insert an interpretation of the humanistic tradition into the discourses of lifelong learning. He makes a useful distinction between 'information' (which can be collected from books or computers) and 'knowledge' which is information that is 'interpreted, understood and placed in a context' (Gustavsson, 2002:19). This can offer a vision of lifelong learning which requires a more holistic approach to the learning process than is often described in texts or policies which use employability and economic skills as the foundation.

Gustavsson (2002:18) stresses the essence of learning should not be forgotten – that 'our process of learning and experiencing starts at home'. Learning is tied to moving from 'the known to the unknown', and in contemporary times the individual's starting point is connected to a local community as well as to a global one (ibid:18).

Field (2006) argues that we are already living in a 'learning society' (Field, 2006) where our lives are about learning in order to manage the life changes we face. Because of globalisation and the explosion of information, Field (1996: 46) says the learning society is not a goal to be achieved in the remote and distant future, it is a living reality. There are more and more opportunities being provided for adults to engage in learning – whether this is through formal programmes like distance learning, continuing education or professional development; or informal opportunities through a church, community organisation, museum, or even a sports club.

But despite the increased opportunities for learning available in everyday life, participation in education throughout life tends to depend largely on the length of initial formal education. For this reason, Walters and Watters (2001) draw attention to the potentially divisive role of lifelong learning in a developing country like South Africa.

Research shows that the more education you have the more you want ... Ensuring that lifelong learning in the region does not perpetuate the vast divide between a small elite 'who know' and the vast majority 'who don't' is therefore also a political contestation. Adult education and lifelong learning continue to be 'sites of struggle' in Southern Africa (Walters & Watters, 2001b:112).

Thus, the humanistic tradition which emphasises the natural human drive to learn and develop has new relevance in the fast changing contemporary world, where acquiring new knowledge and competencies is

essential for conducting one's everyday life. But, grave concerns are raised about how socio-economic and political factors can disadvantage an individual's ability to reach self-fulfilment (Walters & Watters, 2001b; Gustavsson, 1997).

2.4.3 Social discourse

Ideally education serving the social or democratic citizenship agenda should be aimed at building a society that is organised to respect the equality of all human beings, and to enhance every citizens' capacity to be human and 'to live in a meaningful, fulfilled and useful way' (Martin, 2003:571). This image of education which serves society by strengthening all individuals through a progressive education was difficult to find in the review of the literature. Most writers who address this topic focus on the nature of political contestation around the modern state and its use of educational policy discourses (Walters & Watters, 2001b; Martin, 2003; Crowther, 2004; Aitchison, 2004).

Historically in South Africa much adult education was linked with social, political and cultural development tied in with the struggle against Apartheid (Walters, 2000; Walters, 2006) and was used by community-based organisations to mobilise people into the struggle for democracy. In early African National Congress (ANC) policy discussion documents, lifelong learning was identified as an instrument for creating a democratic society (Walters, 2006:9), and with the advent of democracy, the new government adopted 'lifelong learning' as the foundation of its education policies.

The restructuring of the education system and the development of the National Qualifications Framework (NQF) post-1994 was driven by strong lobbies from the trade union movement and from the business community. Their two competing agendas – for large-scale redress, equity and the creation of democratic citizenship on the one hand, and the rapid up-skilling of the labour force to meet the challenge of global economic competition on the other – were joined in the emerging policies which created a unified education and training system in the NQF (see for example: Aitchison, 2004; Kraak & Young, 2001). In many respects, it could be argued the new education and training policy tried to unite these two opposing discourses – education to meet the needs of the workplace (economic discourse) and education for the democratic transformation of society (social discourse).

In reviewing educational reform achieved thus far, Aitchison (2004) argues that the policy makers have failed to uphold the promise of social transformation which was articulated during the anti-Apartheid struggle, and instead have simply *equated* lifelong learning with the creation of a national qualifications framework.

Walters (2006), in contrast, suggests that when looking at lifelong learning, there should be a more inclusive view of what constitutes adult learning. Walters describes a variety of initiatives from civil

society, such as capacity building in community-based HIV-AIDS education programmes, to the formal state programmes like the increased spending on workplace learning through the Sector Education and Training Authorities (SETAs). She suggests that the NQF should be seen as only one part of the growth of a learning society. Walters also keeps hold of the notion of education's role in the promotion of democratic citizenship. Although she does share some of Aitchison's concerns about the increasing dominance of the narrow economic paradigm in the South African educational policy discourse, she argues that practitioners of adult education and training can also be 'agents' creating a different discourse (Walters, 2006:22).

Walters (2006) argues that the discourse of democratic citizenship has to be created – much like Edwards' (1997) notion that lifelong learning is comprised of practices defined and constituted through narrative processes. The notion of democratic citizenship is also contested and Walters suggests that education policy can be influenced. In contrast to the economic discourse sometimes contained in lifelong learning policy statements, the *Mumbai Statement on Lifelong Learning, Active Citizenship and the Reform of Higher Education* (published by UNESCO in 1998) puts forward a quite different interpretation.

We see the purpose of lifelong learning as democratic citizenship, recognising that democratic citizenship depends on such factors as effective economic development, attention to the demands of the least powerful in our societies, and on the impact of industrial processes on the caring capacity of our common home, the planet. (UNESCO, 2000: 266).

The three discourses that have thus far been identified have played an active role in shaping the way in which the research methodology was constructed, as well as providing anchor points for the interpretation of both sets of data. The way in which these three discourses inter-relate, or come into conflict, in educational practice will be examined during the analysis of the data in Chapters Four, Five and Six.

Having identified some of the conceptual underpinning discourses of lifelong learning, in the next section I discuss the higher education context in which these will be addressed during this study.

2.5 What about lifelong learning in the higher education sector?

In the higher education context, there are various terms in use that refer to the opportunities for learning throughout one's life. One of the most common terms is 'continuing education', which indicates general as well as vocational education beyond initial tertiary education. But it is not clear if this term means a sequential stage or level of education.

Since the 1990s, Duke (2002) argues that universities have shifted in response to the changing conditions. In many instances, universities are being transformed into 'adult universities' providing lifelong learning for all, as part of the 'emergent knowledge societies' (Duke, 2002:25). As the universities' main role 'shifted from 'finishing school' to a more balanced 'service station' and 'lifelong learning mode,'

(ibid: 15) more emphasis is placed on providing education for working people to be able to make continued use of learning opportunities which assist their career and personal development.

While this trend to give greater attention to adult learning, professional development or applied learning opportunities does seem notable in higher education institutions in the UK and Australia (Duke & Jones, 2005), it is worth asking whether similar developments are taking place in South Africa. There is no doubt that adult education as it has been practised at South African universities have also been undergoing changes (Buchler *et al.*, 2007; Small, 2004), but it is difficult to conclude that developments around adult education practices are ‘transforming the universities’ here. This may be the case at the University of the Western Cape where the Division for Lifelong Learning has helped to ‘mainstream’ the discourse of lifelong learning in the institution (DLL, 2000). At UCT, the Centre for Open Learning was created in 2005 to extend the work of the Centre for Extra-Mural Studies (similar to trends noted by Duke (2002) at UK institutions), but this does not necessarily imply a broader shift by the institution to focus on adult learners and continuing education. This discussion will be taken up again in the final chapter of this thesis.

Duke also discusses the pressures on universities to become increasingly entrepreneurial to contend with new questions about economic viability of educational ventures. All universities need to diversify to gain income, as increasingly there is not sufficient public funding in the modern state (Duke, 2002; Subotzky, 1999; Muller, 2003). This trend is also being felt in South Africa⁶, and the burgeoning of continuing education offerings does appear to be linked, partly, to the opportunity to ‘make money’.

The Cape Town Statement on the Characteristic Elements of a Lifelong Learning Higher Education Institution (Walters & Watters, 2001a) takes up the issue of lifelong learning from the usual starting point – the definition of the term. In this article about the Cape Town Statement, like other authors (see for example, Edwards, 1997; Coffield, 1999), Walters and Watters argue that lifelong learning needs to be given particular meaning and shape by the work of ‘activists and academics’ to create lifelong learning for ‘active democratic citizenship’ (2001a:473). They developed a set of ‘key categories’ developed by the Cape Town Conference on Lifelong Learning, Higher Education and Active Citizenship (CLLHEAC) which offer guidance on how to create and support lifelong learning at higher education institutions.

Since my research purpose is not evaluative, I have not considered these categories but there are useful ideas raised in the article which have assisted with this thesis. Crucial questions about constructing an identity as a lifelong learning institution are raised, and the development of the indicators is offered as one way in institutions can be lobbied to transform or ‘re-imagine’ themselves (Walters & Watters, 2001a:478).

⁶ For example, in July 2006, Higher Education South Africa (HESA) convened a conference entitled *Diversifying income for Higher Education: challenges and opportunities*. (HESA, 2006).

2.6 In summary

In its simplest sense, the term lifelong learning represents a broad approach to education, shedding the physical confines of formal, institutional models (education no longer has to take place in a school, at a college or university), the usual time limits (education no longer has to be completed before starting working life), the narrow definitions of content (education can be tacit, informal, knowledge or skills-based) and the restrictions on purpose (education can serve economic, social and personal ends). Lifelong learning's popularisation has been fuelled by the rapid changes in the social world of the new millennium. But with the broadening of the term, so the contestation of meaning grows – captured by Edwards' evocative concept of the 'moorland of lifelong learning' (1997:67).

My exploration of the various discourses underpinning the term lifelong learning proved to be a useful lens for this study. Three discourses were outlined in the chapter – the *economic discourse* around education indicating a greater focus on equipping people for work, the *humanistic discourse* emphasising people's natural interest in learning for self-fulfillment and the *social discourse* in which education is seen to serve the needs of society or for the 'public good'. These three discourses offer three possible 'definitions' or interpretations of the meaning of lifelong learning which can be discussed as separate 'strands', or woven together to develop a composite definition. It appears from the commentary in the literature (see for example Edwards, 1997), that a definition is given meaning through the narrative processes and enactment in social practices (to be taken up further in Chapters Five and Six). This approach – of looking for the way in which the term is given meaning – will be used in building the research design and methodology in the next chapter.

CHAPTER 3

3. METHODOLOGY

In this chapter I outline the methodology and research design. The purpose of this research, the general approach and the limitations of the research are discussed at the beginning and the end of this chapter. The research methods and approach to the data gathering are explained in sections 3.3 and 3.4, while the two approaches adopted in the analysis of the different types of data are set out in section 3.5.

3.1 Purpose

Maxwell (1996) distinguishes between *personal*, *practical* and *research* purposes, and urges researchers to be explicitly aware of these purposes when embarking on a project. The personal purpose focuses on the motivations of the researcher, the practical purpose focuses on ‘accomplishing something’ and the research purpose focuses on ‘understanding something’ (Maxwell, 1996:16). In my case, the three purposes are quite closely related. As an adult educator working in the higher education sector (see further elaboration in Chapter One), I was interested in gaining a *greater understanding* of the particular context of the institution where I am working, so I can be better able to design programmes for continuing access to education at tertiary level (i.e. *accomplish something*).

Overall, my purposes in conducting this research included the following.

- To interpret the different understandings around the concept of lifelong learning held by key roleplayers at UCT;
- To better understand the institutional context of UCT;
- To enter the debate on adult learning in higher education and contribute to the discussion on ‘widening access’ at UCT.

3.2 Approach

The approach to this study involved: qualitative research, an interpretive philosophy and an inductive approach to the data.

3.2.1 Qualitative research

The research design pointed to qualitative research methods, since the substance of the question focuses on exploring understandings of a ‘concept’ and its context (Maxwell, 1996:17–22).

Qualitative researchers thus tend to focus on two kinds of questions ... questions about the *meaning* of events and activities of the people involved in these, and questions about the influence of the physical and social *context* on these events and activities (Maxwell, 1996:59).

3.2.2 Interpretive philosophy

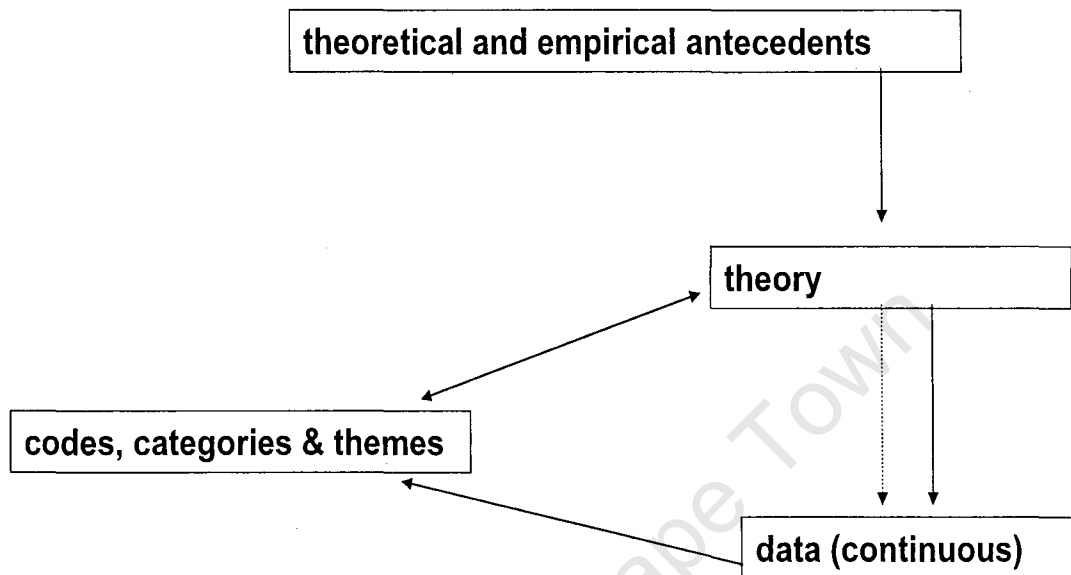
Grix (2004) argues that qualitative researchers tend to work from 'an interpretivist philosophical position' when gathering data to look for patterns, trends and relationships (ibid:120) – i.e. to interpret the data. Adopting an interpretive approach allowed me, as the researcher, to view theory as, in some way, 'deriving from data collection' (Grix, 2004:108), although theory did also shape the approach to interviews (as explained in more detail in later in this section). The interpretive approach has been used in educational research to focus on social practices (Usher, 1996:18), arguing that, to make sense of the social world it is necessary to understand the 'meanings that construct and are constructed by interactive human behaviour' (ibid:18). By selecting to focus on perspectives, the research assumes that people's understandings influence their behaviour (Maxwell, 1996). This was based on the assumption I was making that 'institutionality is inscribed in people and practices' (Muller, 2003:13).

While I chose to focus on the *individual* understandings of key informants for the primary data collection, I was also interested in establishing whether there was a meta-level institutional discourse, represented in official documents, and how this related to the individual perceptions.

3.2.3 Inductive approach to the data

The interpretive approach generally favours the use of theory in an inductive way – where conclusions are drawn from the data, and then 'fed into the development of a theory' (Grix, 2004:113). However, my research process started by using theory to construct models and themes through which I framed the interviews and documentary data gathering processes. Ensor & Hoadley (2004) developed a representation of a particular variation of the inductive approach showing how the theoretical framework interacts with the data collection in constructing the 'codes, categories and themes' which effectively captures how I approached my research. I have reproduced the top part of their diagram on page 24 to demonstrate the processes of theory building in this approach⁷.

⁷ I adapted the diagram by omitting the lower portion of the diagram where the authors include issues around the Bersteinian concept of 'discursive gap', which I do not deal with in this thesis.

Figure 1: Inductive approach to classroom observation*Source: Adapted from Ensor & Hoadley (2004)*

The theoretical framework used may be well-developed in advance of the study (reflected by the solid arrow) or more tenuous (reflected by the broken arrow), but in both cases there is a relative openness in the way in which theory will be developed to read data. Data analysis is an iterative process that brings theory and data into dialogue with each other in order to generate categories and claims (Ensor & Hoadley, 2004:82).

Based on the review of literature and my own 'pre-understandings', which Usher (1996:21–22) argues is an important part of knowledge development, I created a framework for the interpretation of lifelong learning to present to the key stakeholders interviews for consideration (see figure 2 on page 30). These would represent my 'codes', which were 'tenuously' created in order to anchor the rather abstract concept of lifelong learning.

3.3 Case study research

O'Leary (2004) defines a case study as a method of studying parts of the social world through the comprehensive description and analysis of a single situation. A case study is characterised by the emphasis on context '... as the rationale for honing in on a specific case is to be able to identify, uncover and unpick specific contextual factors in which your study subject or site is embedded' (Grix, 2004:51). A single case study, as I am using, is a specific approach which aims to view the phenomena through the in-depth analysis of an individual case (ibid: 51).

I was interested in understanding the way in which the higher education sector is interpreting the new emphasis on lifelong learning, but I needed to find a concrete case through which to examine a vaguely-defined term. Being able to look at actual practices and see the ways these were being interpreted seemed to be a productive approach.

Common weaknesses with case studies tend to be the lack of generalisable results and the potential bias of the research (Mouton, 2001:150). The weaknesses in this study will be identified in section 3.6.

3.4 Data collection

The thesis relies on these two sets of data – primary data transcribed from semi-structured interviews with key informants and secondary data comprising the University’s official documents relating to lifelong learning. Having more than one type of data was seen as a way of increasing the reliability of the study and enabling the discussion of results to extract themes from the whole ‘data set’ (Ensor & Hoadley, 2004).

3.4.1 Primary interview data

Since my research questions are focused on ‘understandings’ of lifelong learning, the research draws on primary data gathered from a selection of interviews with key informants. The interpretive approach supports the use of interviews with a small number of subjects if the purpose is to probe meanings given to concepts. If the selection of informants is to be small, the *criteria* for selection becomes critical – and this proved to be a challenge in this research. The first step was to identify where the practitioners involved in lifelong learning were most likely to be located within the institution, so identifying sites where lifelong learning was taking place became important.

3.4.1.1 Criteria for identifying sites

Although one can find some reference to ‘lifelong skills’ and ‘educating for life’ in some of the UCT promotional material (see Chapter Five), the problem I faced was how to identify those who thought they were involved in providing opportunities for lifelong learning. Everyone enrolled at UCT was engaged in learning, so the question remained how to find evidence that the institution provided opportunities to learn throughout life? The possible indicators of ‘lifelong learning’ which I considered included:

- age – older, mature students enrolled in courses;
- flexible study options for working people – part-time students;
- programmes targeting those who wished to return to study – continuing education, professional development and short courses which provide educational offerings to diverse target audiences, levels and purposes.

- **Age – ‘mature students’**

Older students would be one of the possible indicators of people taking up opportunities to learn throughout their life. Using nationally compiled databases, older (‘adult’) students⁸ are actually in the majority at higher education institutions, at close to 55%, according to research done for the Council for Higher Education (CHE)’s triannual review (Buchler *et al.*, 2007). But these authors caution about making assumptions based on these statistics without further investigation. The percentage of students does not indicate whether these older students are adults returning to study, simply post-graduates who have stayed at an institution longer, or whether they are school leavers who, due to the historical legacies of apartheid education, have spent longer than average completing initial schooling. For these reasons, the 23-year-old marker may not very helpful in denoting adult (as opposed to school-leaver) access to higher education.

At UCT the majority of those enrolling for first time studies are school-leavers (which goes against the national trend) for example, in 2005 72% of new students came straight from school⁹ while between 2002 and 2004, 65% of all registered UCT students were under 23-years-old¹⁰. There is no doubt further useful work that could be done on analysing and working with the student age statistics at UCT, but it appeared to me that it would not provide an easy pointer for where I should look for lifelong learning programmes.

- **Part-time students**

Part-time enrolment for courses would be one way in which adults might engage in learning while continuing with their lives as working people – but it is very difficult to track part-time students at UCT.

Thus, when I asked the UCT Institutional Planning Department to look for part-time programme enrolment for 2006, there were only 149 part-time student registrations in the whole university. These were drawn from only six programmes formally listed as ‘part-time’ in the Faculty Handbooks (personal communication with IPD official, 19 October 2006). Obviously, there is a problem with terminology and definitions. Many courses are structured so that people are able to attend classes in the late afternoon, making it possible to maintain a working life while studying. However, there is no quick way of finding out which of these students are studying while holding down jobs, or even in which programmes or faculties the people who keep on working while studying are to be found. Thus, the definition of *part-time* was too loose to be useful as an indicator.

⁸ Defined as 23 years or older.

⁹ Internal UCT data sources, October 2006.

¹⁰ Internal UCT data sources, October 2006.

- ***Continuing education, including short courses and professional development***

Continuing education is used to indicate general as well as vocational education beyond initial, foundation education (Salling Olesen, 2004; Duke, 2002; Weil, 1986). Given that the common use of the term ‘continuing education’ in tertiary education¹¹ in South Africa is taken to mean post-school educational provision for *adult* working people, this offered one way of identifying possible case studies of lifelong learning opportunities at UCT. This became a starting point of where to focus the research – I selected *continuing education* to be the best place to look for evidence of lifelong learning going on at UCT.

3.4.1.2 Where to find the informants

Having decided that ‘continuing education’ would guide the selection of sites where informants could be located, short courses offered a way of identifying lifelong learning because these kinds of courses are clearly not aimed at UCT students currently enrolled for a degree.

Two of the most useful reports relating to UCT which dealt with relevant material were the Centre for Extended Learning’s (CEL) report on workplace learning¹² (CEL, 2004) and the UCT Social Responsiveness Audit¹³ (UCT, 2003a). Both the reports offer lists of existing programmes at UCT, itemised by faculty. The CEL report specifically asked faculties to list all continuing professional development and short courses, both of which would fall firmly into any definition of lifelong learning education provision. Although the Social Responsiveness Audit was not directly focused on continuing education or workplace learning, the audit information gathering questionnaire included an explicit question about access to the programmes for ‘non-traditional students’. This provided some information about students coming into programmes via Recognition of Prior Learning (RPL), as part-time students, via short courses or customised programmes.

Honing in on short courses also made for an easier common ‘language’ when speaking to a range of different people. If my working definition of lifelong learning included opportunities to learn throughout your life, then short courses provided one way of looking for the ‘opportunities’ that UCT is providing. Obviously, this was a narrow focus within the broader category of lifelong learning – but it provided me with a way to identify ‘practitioners’ for interviews.

¹¹ For example, in a national research project on widening participation for adult learners in tertiary institutions, the research team stated their assumption that adult learners were most likely to be found in distance education programmes, continuing education courses and part-time degree and postgraduate registrations (see Buchler *et al.*, 2007).

¹² The Centre for Extended Learning commissioned a report on all the higher education partners which make up the consortium in order to establish the capacity of the institutions to provide workplace learning in the Western Cape.

¹³ The Social Responsiveness Audit documents and begins a conceptualisation of the myriad of ways in which the University is involved in socially responsive activities. It offers an overview of a range of activities including research, service learning, community outreach, capacity building training for organisations and public education.

3.4.1.3 Which informants?

I decided that members of the temporary University committee – the Short Course Task Team which had been convened to develop UCT's policy on short courses – would include the kinds of informants I was interested in interviewing. The Short Course Task Team represented a unique configuration of interests at UCT since it had been called together by the Institutional Planning Department, it comprised representatives from all the faculties, and included many people who were involved in such programmes. Members of the Short Course Task Team were all potential informants since they worked in sites I had identified as representing some evidence of lifelong learning practice.

3.4.1.4 Pilot survey

A pilot questionnaire or survey, as advocated by Maxwell, can be used to explore the meanings held by the participants (1996:45). I designed a pilot survey to assist me develop my interview tool. The pilot survey questionnaire was sent by e-mail to the 19 members of the Short Course Task Team. It comprised two pages with three multiple choice questions (see Addendum A). The first question intended to find out what programmes or courses the respondents were involved with, and if they saw this work as providing lifelong learning. The remaining two questions probed their understanding of the purpose of those courses. I also asked for permission to interview them further. I had 10 responses (just over half of the 19 e-mailed), but not everyone was willing to take part in a follow-up interview.

The survey questionnaire responses served as a basis for interviews which comprised my next step in data collection. Methodologically, since I was doing a case study of an *institution as a whole*, it was important to look across the entire institution. In a university context, the structure of the institution into six faculties offered me a way of selecting informants – I wanted to make sure at least one informant was interviewed per faculty. Those interviewed included seven members of the Short Course Task Team who responded to the request to be interviewed (from four faculties) and four informants whom I approached directly for interviews. I approached two informants from the faculties which were absent (Science and Health Sciences) and I included two formal part-time UCT credit-bearing programmes for reasons specified below.

Practitioners from two formal credit-bearing UCT qualifications – the Masters of Business Administration (MBA) at the Graduate School of Business and the Diploma in Education (Adult Education) were also approached for interviews because of the particular emphasis on adult learners. The two programmes offer very different levels of access into higher education since the MBA is a stringent post-graduate programme while the Diploma is an entry-level tertiary qualification. I included these practitioners because they both saw their work as relating to lifelong learning and in both cases, the courses require that learners have *several years working experience*, and expect that learners do *go on working while studying*. These courses are either offered as part-time programmes or they are offered in modularised form to accommodate working learners.

3.4.1.5 Interviews

The bulk of the data in this research comes from 10 in-depth interviews conducted between December 2005 and August 2006, and focused on 10 programmes or courses across the six university faculties (see Addendum B for a list of the interviews). In two cases, group interviews were conducted with more than one staff member from the same programme, however, the intention of the interview was to solicit perspectives from practitioners in relation to those programmes – so I did not especially highlight the different voices in the group interviews. The informants were selected because of their location as key staff members in particular programmes which could be said to be offering continuing education. In Addendum E, background information about each programme is outlined. I have also provided a discussion of the types of courses I looked at in the addenda (see Addendum D). The interviews were conducted using a semi-structured interview schedule (see Addendum C) and each interview lasted between 30 minutes and 90 minutes, so there is some unevenness in the depth of information gathered per programme. The interview length depended on how much the informant wished to engage with the issues. The common areas covered were a description of the programme, how the programme emerged and changed, what factors influenced it over time, the individual's personal history and then their interpretation of their programme's location in terms of my rough model of the dimensions of learning purpose. The interviews were recorded (with the permission of the informants) and transcribed. Informants were offered the opportunity of reading a near-complete version of the chapter on practitioner discourse (where the interview material was used) to check for accuracy.

3.4.1.6 Models and themes

The 'codes' which I used were the discourses identified in Chapter Two as economic, humanistic and social. For ease of use, a model was set up for use in the interviews where these were translated as three points on a 'triangle of purpose' namely the economic, the personal growth and the social or civic (see Figure 2: Dimensions of purpose on page 30). In looking for a model which could represent the ideas, a triangle seemed to offer a way of showing that while an educational programme might have a primary purpose, it is likely that there would be other interrelated purposes. Just how these would relate was not clear and it was hoped that the interviewees would offer insights which could be used to adapt the model. The graphical representation gave me a way of talking about the various discourses with practitioners in the field even when the language alone was not always self-explanatory.

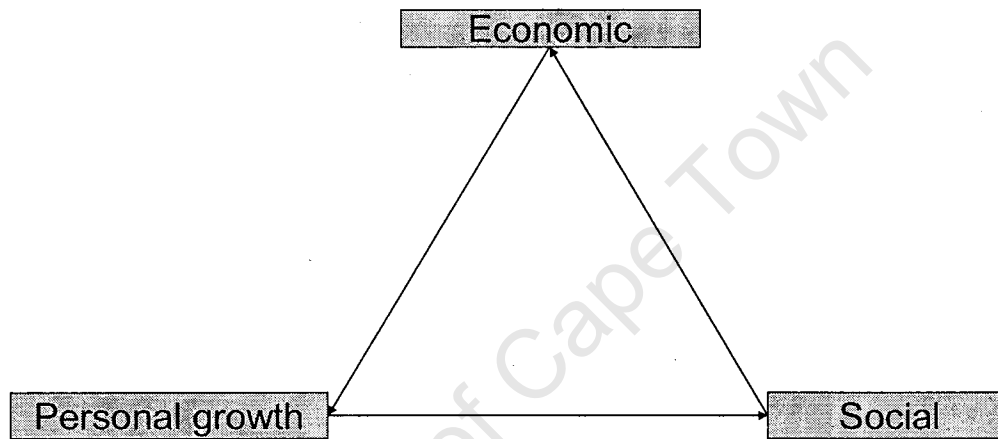
In the interviews, I presented the simple diagram and asked the informants to plot why they thought learners came on their courses. The three corners were labelled with three possible educational purposes:

- economic (explained as meaning that the course would provide an opportunity for learners to improve their skills for the workplace);

- personal growth (explained as meaning that the courses would offer learners new knowledge for personal enrichment, or improve their intellectual knowledge and understanding because of a general interest in the subject);
- social (explained as meaning learners would gain knowledge or skills which would better equip them to understand or serve society, or become a better citizen).

Figure 2: Dimensions of purpose

Lifelong learning – dimensions of purpose



Further discussion of this framework, which was constructed and then adapted through the process of analysis (where the model was put ‘into dialogue with the data’), is to be found in Chapter Five and in the discussion of the research results in Chapter Six.

3.4.2 Secondary data

My second set of data came from an analysis of the University’s official documents relating to lifelong learning. The purpose of having this second set of data was to examine an institutional representation of lifelong learning which could also be used as a form of triangulation for the interview data.

I gathered this material as part of the general data-gathering process, which preceded, and continued at the same time as I conducted my interviews. I identified relevant documents based on my own working knowledge of the Institution and by searching the UCT website for policy and publicity material. In addition I asked for advice on where to find relevant documentary material from the key informants I identified.

The first document I selected can be considered the most high-profile public document of the University – the Mission Statement. This kind of text is most easily accessible to the public and promote the institutional image – representing in Gee’s terms, the ‘dominant discourses’ (Gee, 1990:145).

The other two texts were policy documents also available in the public domain. My primary motivation was to find texts which addressed lifelong learning in some way. Texts were selected that either used the actual words ‘lifelong learning’, or dealt with aspects of university work I had identified as falling into my field of research – namely, the Continuing Education Policy and policy on the Recognition of Prior Learning.

3.5 ANALYSIS

Once the data had been gathered, I applied two interlinked methods of analysing the data: thematic and discourse analysis. Thematic analysis was used predominantly with the interview material, while discourse analysis was applied to the official University documents.

I used the concept of ‘discourse’ in the way that socio-linguists such as Gee (1990), Fairclough (1992) and Cameron (2001) have given it meaning – the ideological dimension of talk or text, or a way of constructing the objects of which it speaks (Cameron, 2001). In this, I too constructed some ‘tentative themes’ – using this literature to identify several possible discourses and then looking for them in the analysis of the texts – the UCT Mission statement and two other policy documents. Once again, there was an ‘iterative’ process operating in that the analysis revealed themes which had not been part of the earlier ‘theoretical model’.

The most useful approach for looking at the documents was to apply a critical discourse analysis of the text. However, when using the tools of critical discourse analysis, the model I had constructed for the interviews remained part of my researcher lens, and influenced the interpretation of the data in the analysis leading me to foreground particularly the economic, humanist and social discourses.

3.5.1 Thematic analysis: the interviews

The initial literature review provided some ideas to build a conceptual skeleton as a tool to engage in a dialogue with the key informants. The model began with the simplest level of analysis, on the assumption data acquired during the dialogue with the practitioners would enrich the theoretical model, thereby allowing me to further develop knowledge and understanding *inductively during the study*.

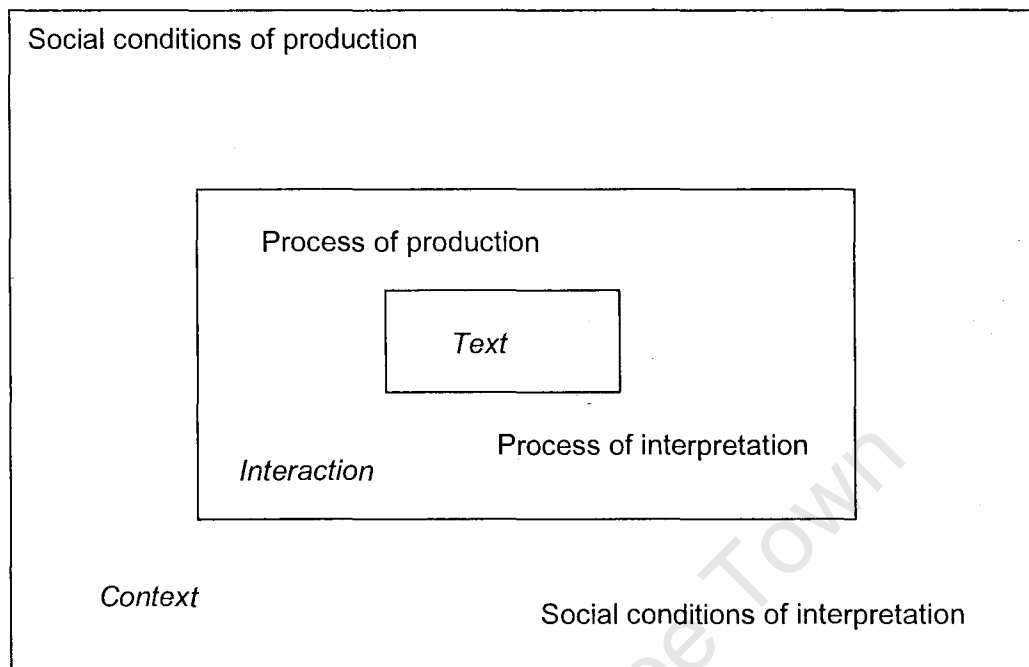
The results of the discussion with interviewees are reflected in Chapter Four, and the basic model discussed further in the Chapter Six. One important methodological problem arose with the model during the interviews which was not finally resolved: while these three possible paradigms or purposes of education are valid, the question about *from whose* perspective was not so clear. In the interviews, the question was posed in a very open-ended way – the interviewees were asked how they would place their course/programme in relation to the model. But in the subsequent analysis, it became evident that some answered from their *own vision* of what the course should be offering learners, while others responded about *how they thought learners viewed* the programme. Without any learners interviewed for triangulation, the views elicited about the learning purposes remain the course convener/lecturer's own perspective.

3.5.2 Critical discourse analysis: the University documents

In analysing the secondary data, I used theoretical tools of discourse analysis applied to texts (Cameron, 2001; Starfield, 1999) to conduct an analysis of the University's documents. This analysis was also drawn on to identify key themes around which to discuss the research in Chapters Five and Six.

I examined UCT's institutional 'discourse' to identify the representations of lifelong learning. It meant looking for any terms, language or descriptions in 'officially sanctioned' texts which are used to portray UCT's current approach to or future vision of lifelong learning, but when doing the final analysis, the complexity of organisational culture and identity had to also be reflected.

Social and material conditions determine the properties of discourse (Fairclough, 1989:19) and these need to be considered when analysing a text. I adapted parts of Fairclough's model of discourse (see Figure 3) to apply a form of critical discourse analysis (see Cameron, 2001 & Mesthrie *et al.*, 2000), for analysing the texts.

Figure 3: Diagram of discourse*Source: Fairclough (1989: 25)*

Fairclough's discourse model involves looking at the characteristics of the text itself (text), at the processes which gave rise to the text's production and how it is interpreted, as well as at the larger social practices in which the text is embedded. For the purposes of this discussion, this diagram will be used to deal with three levels of analysis – the first level focuses on what the text says (Fairclough's 'description'); the second level, examines the processes of production and interpretations of that text (Fairclough's 'interpretation') and the third level focuses on the social context (Fairclough's 'explanation').

Fairclough stresses that in using critical discourse analysis (CDA), analysts are offering 'interpretations of complex and invisible relationships' (1989: 27). The field of CDA is highly complex, and in this thesis, only parts of the greater analytical model will be deployed. In the next section I will briefly describe some of the more commonly-used tools of CDA which will be deployed in Chapter Five: language, intertextuality, discourse and text, processes of production and interpretation.

3.5.2.1 Language

From the perspective of critical discourse analysis, language is part of society (Fairclough 1989, 1992), and all linguistic phenomena are social phenomena because whenever people read, write or speak to each other, they do in ways that are 'socially determined and have social effects' (1989:23).

With language, every utterance or sentence involves a choice (of words, grammatical construction, tone, and so on) and this results in 'ideologically patterned' texts (Fairclough, 1989:124). By making certain discourse choices, writers are aligning themselves with particular interests and ideologies (Ivanič, 1997:46).

Cameron (2001:125) elaborates on this; for example, the selection of certain pronouns can represent much about agency ('me' or 'you' or 'them' or 'agentless constructions' such as 'the University', 'the course') – this is termed 'modality'. The vocabulary and grammar can also have the effect of foregrounding some issues and backgrounding others.

3.5.2.2 Intertextuality

The borrowing of one kind or 'genre' of discourse by another is called 'intertextuality'. Fairclough (1992) provides the example of how the language of universities is shifting into the marketing/selling discourse.. Educational institutions are borrowing advertising discourse – they are now 'selling not telling' (Fairclough 1992), and in this process creating 'hybrid models' of discourse (Cameron, 2001:130).

Another broad trend noted by Fairclough (1992) and Cameron (2001) is that most institutions are shifting away from 'formal' institutional discourse to more personal/casual modes of address. These writers note the 'synthetic personalisation' created in the growing use of personal pronouns which is intended to convey sincerity. Some examples of this are highlighted in the Chapter Five.

3.5.2.3 Discourse and text

Fairclough (1989: 24) makes a clear distinction between the written document or 'text' which is a product ('... of a process of text production') and a 'discourse' which is the whole process of social interaction. These descriptions can be understood more easily by looking at his discourse diagram on page 33. The process includes the *process of production*, of which the text is a product, and the *process of interpretation*, for which the text is a resource.

For my purposes, the documents being examined in Chapter Five will be the 'text', but the analysis will look at the 'discourse' – i.e. what underpins these texts. Analysing the *language* as well as the *social contexts*, is an attempt to interpret what meaning is being given to lifelong learning at UCT.

As the approach of critical discourse analysis sees social practice as not only 'reflecting' a reality, but it in an active relationship to reality, social practices can actually change reality (Fairclough, 1989:37).

... if an institution wants to change the relations it has traditionally had with people – for instance to recast hospital patients or university students as ‘customers’ – then one of the things it has to do is instruct them in their new roles and relationships by changing the way it addresses them ... From this point of view, the emergence of new kinds of discourse is not only a *consequence* of social change, but also an *instrument* of social change (Cameron, 2001:129–130).

In other words, ‘discourse is a form of social practice that *constructs the objects of which it purports to speak*’ (Cameron, 2001:123 my emphasis). Reality is constructed, ‘shaped by various social forces’ (ibid: 2001:123) but often it seems naturalised, this ‘reality’ is presented as ‘the way things are’.

3.5.2.4 Processes of production and interpretation

Part of social practice is the creation of discourses or texts which construct identity. When examining a text, an initial question would be: At whom is it being directed? Using the tools of discourse analysis, Fairclough (1989:49) points out that in any form of media, the text is shaped to address an ‘ideal subject’ and the actual readers have to ‘negotiate a relationship with the ideal subject’. The processes of production of a text refer to the ‘mental, social and physical processes, practices and procedures involved in creating the text’ (Ivanič, 1997:42). This is about what people are thinking and doing when they write or read text, which can only be surmised from the context in this thesis since the writers of texts were never interviewed.

One of the questions which will need to be addressed is whether the texts provide *evidence* of practices or whether they present an interpretation of reality that the institution wishes to portray – ‘an ideologically loaded ‘story’ (Gee *et al.*, 1996). Therefore the discussion should address, firstly, how lifelong learning is represented. And then, secondly, attempt to identify the influencing factors which have impacted on the processes of text production (whether referring to spoken or written discourses).

3.6 Research ethics, validity and limitations

3.6.1 Ethics

This research was carried out in accordance with the research ethics laid out by the Faculty of Humanities at the time which required the research to adhere to principles of scholarly responsibility, integrity, human dignity and academic freedom. The identity of the interviewees has been withheld so that they do not feel compromised about what I, as the researcher, conclude from the interviews. However, the programmes and courses are described explicitly in the addenda because, for most readers not familiar with UCT, it is important they understand as much of the nuance of the context and content as possible. This may make it possible for readers who are closely involved with the case to identify the individuals who were interviewed because their programmes are described in some detail.

The information about the University was gathered from the following types of documents:

- i) documents on the UCT website (for example, the Mission statement, the CE policy, the RPL policy and various descriptions of individual departments and units)
- ii) documents sourced from other institutions or websites (for example, the Council on Higher Education Executive Summary of the Audit Report on UCT)
- iii) published reports (such as the Vice-Chancellor's Vision 2001 & Beyond)
- iv) internal UCT documents (for example, the founding documents of the Centre for Open Learning) which are available for reference purposes.

3.6.2 Validity and limitations

I devised several critical questions which I believe should be posed when considering the validity and limitations of the study.

- *Were the criteria for selecting the informants valid?*

The thesis could possibly be challenged for selecting too narrow a definition of what constitutes lifelong learning at the tertiary level. However as there are many ways of selecting candidates to be interviewed, finding a common denominator in short courses provided a useful way of gathering material relevant to the study.

- *Were the interviews done in sufficient depth and results accurately recorded?*

Basic research methods were followed with the construction of an interview schedule as well as the recording and transcribing of the interviews before analysis was begun. However, there are some particular weaknesses in the data itself namely: i) Consistency: the material is not all of the same quality or detail, so when I wanted to do comparisons across all interviews, the data was not always there; ii) The use of the model of lifelong learning was not sufficiently clear in regards to whose educational purpose I was asking about – the interviewees' or the learners' – making the results of this question more open to interpretation than they should have been; iii) My knowledge and understanding grew as the interviews went on, so I was able to ask more precise questions in the later interviews.

- *Are the analysis and the conclusions reached reasonably based on the material which was looked at?*

The study chose to balance a small number of interviews with limited analysis of the 'public discourse' of the University – and this means it has the elements of a small-scale study.

A valid argument is made using the evidence gathered. As a qualitative and interpretive study, its findings are always open to challenge from another perspective.

- *Is the study large enough for an institution the size of UCT?*

With an institution of this size, and a concept as loose as lifelong learning, it was clear from the outset that this study will not 'represent' the University, but the research does offer a reasonable cross-section of current practices and conceptions. It is not a quantitative study and does not therefore claim to have exhaustively examined all relevant material or views. However, given that continuing education and lifelong learning are themselves somewhat marginal to the core educational business of UCT, the scale of the study is realistic.

- *Was the selection and exclusion of documents made on valid grounds?*

I made no attempt to do a comprehensive survey of all documentary evidence available. There could be a specific research study done on the analysis of official discourse through texts which sourced a far wider range of material and therefore, voices. However, the ones selected do have the most direct bearing on the thesis topic.

Because of scale, I decided to focus only on current documents, therefore I was not able to capture changes in the official discourse over the past few years or how the identity of the institution is shifting.

- *As the authors/writers of the documents were never interviewed, how valid are the conclusions?*

The tools of critical discourse analysis do legitimately allow for analysis of texts without knowledge of the processes of their production. By examining language closely, it is possible to draw conclusions about intentions and meanings, and then use the interview data from practitioners as a method of triangulation. However, CDA does have a subjective component.

The next two chapters present and analyse the two sets of data: the interviews and the University documents. In Chapter Four, through the interviews, the practitioners' voices are considered and in Chapter Five, the official University documents are examined.

CHAPTER 4

4. ANALYSIS OF PRACTITIONERS' DISCOURSES

In this chapter I will analyse the interviews done with key informants located across the faculties at the University. These interviews, with people who implement a range of continuing educational programmes, will be used to illuminate the practitioner¹⁴ discourses and relate them, where possible, to the discourses identified in the earlier chapters. Table 1 below lists the programmes or courses which feature in the interview discussions. For full contextual background about the programme which the informants were discussing, see the Addendum E. The contents of Addendum E are a synthesis of information provided in the interview and descriptive material from the public departmental websites..

Table 1: Programmes and Courses

Faculty	Department	Programme/Course
Commerce	Graduate School of Business	Master of Business Administration (MBA)
Humanities	Education	Diploma in Education (Adult Education)
Engineering and Built Environment	Continuing Professional Development Unit	Short courses for professionals
Commerce	Graduate School of Business	Executive Education courses
Health Sciences	Education Development Unit	Short course for GPs
Commerce	Management Studies	Modules in a Masters programme
Science	A consulting unit within Environmental and Geographical Sciences	Two-week residential course on environmental management
Centre for Higher Education Development	Extra-Mural Studies within the Centre for Open Learning	Summer School
Law	Professional Education Unit	Short courses
Center for Higher Education Development	Centre for Open Learning	Third Term

In the analysis that follows I discuss the findings by considering the way in which the informants spoke about their practice in relation to the lifelong learning discourses and reflecting on the contextual factors they identified as having influenced the emergence and development of their programmes.

¹⁴ I use the term 'practitioner' when describing people whose role and function are those of the conveners, designers, educators or administrators of various kinds of continuing education courses since they have knowledge gained from the 'practice' of continuing education. The term 'informant' will be used specifically when quoting those interviewed.

Firstly, in section 4.1, I reflect on the way in which the practitioners spoke about their programmes (their own 'text') in relation to the three discourses identified in Chapter Two – namely, the humanistic, economic and social discourses in the meanings given to lifelong learning – and reconsider the model based on the analysis of the interviews. In section 4.2, extract three issues from the interview questions about the contextual factors which influenced and changed these programmes.

4.1 Discourses of lifelong learning

In this section of the analysis, I have organised the discussion under headings of the three discourses, even though there is *considerable blending* of the discourses.

4.1.1 Humanistic (or personal growth) discourse

The focus of the discussion on the humanist or personal growth discourse will be on understanding the personal motivations of *learners*, as this is the way in which issues on this topic were most commonly articulated by the informants. Some informants saw 'personal growth' as the main educational purpose served by their programme. However, very quickly it became apparent that 'personal' motivations of learners are closely bound to economic imperatives – some informants talked about how the modern workplace places value on certain personal attributes and other informants indicated how much educational access is still closely linked to socio-economic status.

4.1.1.1 Summer School, CHED

The UCT Summer School most closely embodies this humanistic approach to education. There were three lecturers participating in a group interview (Interview 8) about Summer School. One of the informants interviewed said there are many different motivations for attending Summer School, for example:

There are people who come for relaxation, people who come because it is like a festival, because you see people you know – and there are some people who really come for really quite rigorous intellectual challenge ... (Informant 1, Interview 8, Summer School).

For some, it is about opportunities to learn they have not had in the past. This was the only programme in the data set that informants did not define primarily by its 'economic purpose'. When asked to look at how the Summer School would be positioned in terms of the triangle of purpose, the informants agreed that most people attend courses for personal growth 'keeping yourself alert, interested and knowledgeable', but there are some courses where motivations cross over into gaining knowledge

about 'social or citizenry issues' (Informant 1, Interview 8, Summer School). They did suggest that there were also some courses, such as learning to speak isiXhosa or improving computer skills which people may be interested in because of usefulness in the workplace.

However, one of the informants went further to challenge the category 'personal growth' or humanist discourse arguing that it is important to understand that there are a myriad of motivations underlying that discourse. The informant suggested that the Summer School provides intellectual stimulation for a particular social class, in some way serving as a kind of 'conscious class reproduction' (Informant 1, Interview 8, Summer School).

(Attending Summer School) ... is about lifelong learning for personal *confirmation* not (personal) growth (Informant 1, Interview 8, Summer School).

This informant suggested that while 'personal growth' may be the *articulated purpose* of Summer School, those who attend come with many other purposes, some of which do not neatly fit into the definitions with which I was working. In this light, this informant drew attention to another purpose of education – that of the reproduction of power relations in a society (as she says 'confirming' the existing arrangements of social inequality based on access to education and resources). Many educational writers have commented on the role of schools and universities in the reproduction of social classes (see the discussion in Delanty, 2001:89). Some of the issues around social purpose and whose interests' education serves are discussed further under the social discourse section.

4.1.1.2 Diploma in Education, Humanities

The informant teaching on the Diploma in Education (Interview 2, Diploma in Education) introduced the idea of a constant interplay between the personal (growth) motivations with the economic (more work-related) motivation of learners. The Diploma in Education attracts people interested in gaining professional adult educator skills. The informant pointed out that people's desire for personal growth through educational endeavours often *includes* a motivation for self-improvement in the workplace. The learner's personal identity has become another criterion considered in the competition for employment.

I think it (the increasing demand for continuing education) has to do with the world of work; and the world of work as it impacts on professional identity which has shifted in terms of the expectation to become lifelong learners. It is not that people themselves are suddenly glowing with this new idea – (that is, some people are) ... the workplace is actually making people become lifelong learners ... I think that it is both individual and societal (Interview 2, Diploma in Education).

The need to get more 'formal education' is an increasing pressure in the modern workplace. The informant considered how the notion of lifelong learning places pressure on individuals to continuously improve and expand knowledge, which also serves the interests of the broader society.

I think lifelong learning ... has embedded in it, a notion of a pathway ... Students ask a lot more about where they can go with it (a course), and what it articulates with, and what is the next level (Interview 2, Diploma in Education).

Several theorists (Edwards *et al.*, 2001; Edwards, 1997; Gee *et al.*, 1996; Castells, 2001a; Usher & Solomon, 1999) have pointed to the way in which the new discourse of lifelong learning and learning organisations have an unspoken subtext in which the pressure to improve job related skills has become the employee's personal responsibility.

The discourse of excellence links the organisationally desirable (more productivity, flexible working, increasing efficiency and profitability) with the personally desirable – not just a better worker but being a better person (Usher & Solomon, 1999:158).

But the informant interviewed about the Diploma course cautioned the collapsing of learners' *original motivations* with the *actual outcomes* of the learning experience. When people enter a course of study they may have a different 'purpose' to what they find to be the most important 'outcome'. So, for example, people entering the Diploma in Education at UCT may have come into the programme to get formal recognition or a formal qualification for their role as an educator so as to advance their career (i.e. the economic or work-related purpose). Upon graduation they may have achieved that purpose, but the most significant *outcome is frequently the personal development of a confident identity as an educator* (i.e. personal growth dimension) (Haupt, 2005; February, 2003; McMillan, 1997).

4.1.1.3 Continuing Professional Development, Engineering and the Built Environment

In the interview (Interview 3), there were two informants involved in the running of the Continuing Professional Development (CPD) unit in the Engineering and Built Environment Faculty (EBE). Their flagship programme, the short course on Project Management, offered some interesting insights into learners' personal motivations. One of the interviewees commented on how many of those enrolling for their 12-week short course (which is to acquire a specific work-related set of skills) were paying for themselves.

I would guess only about 30% of those people were paid for by their employer ... the interesting thing about those people paying for themselves, (is that they) think they need the course (for their work) but they don't! (Informant 1, Interview 3, CPD)

The two informants went on to argue that, even if people did not use the skills learnt directly in the course, the personal motivation to take on a commitment to study generally benefited them – it tended to make 'a good impression' on their colleagues, bosses or prospective employers.

... in a lot of instances, people who are prepared to put in the time and make the time to do a short course are recognised – it is seen in their favour (Informant 2, Interview 3, CPD).

The individual's motivation may be to get a better job or to advance their career, but this kind of motivation is seen as a personal attribute in the business world today. This idea is taken further in the following discussion of the interviews with informants from the Graduate School of Business.

4.1.1.4 MBA and Executive Education short courses, Graduate School of Business, Commerce

A focus on 'whole person development' as well as on skills for working with people ('soft skills') has been absorbed into the approach of many business education programmes. In the MBA programme run by the GSB, which is one of the highest levels of business education, the person I interviewed commented extensively about how the programme focus has shifted from being 'only about finance or technical stuff' to include a strong component on working with people. She talked about how there is a new recognition that management is not only about money and numbers, 'If you don't get the people aspect right, you are not going to survive' (Interview 1, MBA). Thus the MBA offers both 'hard' technical management skills training (for example, financial analysis) along with an emphasis on 'whole person development', which involves 'understanding who you are and how you relate to people' (Interview 1, MBA).

In many ways, the ideology of self improvement has taken over from the technical approach to business management. The business education focus is no longer only about achieving excellent maths results, which was the profile of the traditional business administration students – 'the quantum jocks' (Interview 1, MBA).

The predominant group (of MBA students) five years ago would have been white, male engineers – who were very quantitative and comfortable with numbers but not very good at the soft stuff.

It has changed and:

... The real change is the recognition that management is not about numbers – if you don't get the people aspect right you are not going to survive. ... if you want to be a manager at all, you will need people skills (Interview 1, MBA).

The informant interviewed about the Executive Education short courses (Interview 4) described how she sees the new approach underpinning business education.

(T)he ideology used – kind of working from the inside out ... the approach is how do you shift yourself, how do you create a way of getting change inside of yourself.
(Interview 4, Executive Education)

The discussion above has been grouped under 'humanistic or personal growth discourses' but it is evident from the interviews that it is becoming increasingly difficult to keep separate the division between personal motivations and those supposedly based on purely economic motivations.

4.1.2 Economic discourse

Despite the overlapping of categories was being encountered as the analysis proceeded, this section will go back to Chapter Two's definition of economic discourse – which saw learning primarily in terms of equipping people for work (see section 2.4.1). This type of economic discourse was evident in many of the interviews conducted, reflecting both the increasing emphasis broadly on the economic value of knowledge and the tendency for short courses, in particular, to be vocationally or professionally orientated. Some of the key features of the new global economy (as outlined by Castells, 2001a) – the speed of change which drives the need for add-on or updating of obsolete knowledge and the emergence of completely new fields – was noted in the interviews.

4.1.2.1 Legal Education short courses, Law

The informant from the Law Faculty asserted that the economic purpose was the motivation for the short courses offered through that faculty.

It is mostly job-related training. This is necessary to keep them (lawyers) on the cutting edge of the profession ... we cater for people in the legal professional who need to sharpen their skills ... (Interview 9, Legal Education short courses).

Some of the short courses run through the Law Faculty do target people other than qualified attorneys, but even then, it is to offer a specific input on a para-legal field which lay people may have to deal with in their sphere of work.

4.1.2.2 Executive Education, GSB, Commerce

In the case of the Executive Education Unit at the GSB, the Unit was set up specifically (like the unit in the Law Faculty) to cater for professionals who needed this 'top-up' of knowledge and skills, and relies a lot on returning students from the GSB. People who have completed degrees or a programme with a positive learning experience are likely to return to the same institution when looking for new knowledge or skills. This 'repeat business' (Interview 4, Executive Education) is a phenomenon integral to the notion of lifelong learning. As noted in Chapter Two, an orientation to lifelong learning is built out of good experiences during initial education.

When we (the GSB) took part in the *Economist* ratings and we came 10th in the world¹⁵, and one of the biggest things that came out from there was that we had 85% repeat business. That is very high and I think it has to do in part as a result of the kind of methodology which gets used. If you look at lifelong learning – if you can build in tenets and principles which allow people to genuinely change ... What is lifelong learning? (It means education) doesn't stop when you get your qualification (Interview 4, Executive Education).

The informant argues this kind of educational provision is not about offering 'credits', but rather it is to keep top executives abreast of the fast-changing global trends. The underlying view here could be fitted into the human capital theory of lifelong learning where it is believed that in the modern, high technology, 'knowledge society' all workers must become proactive and be prepared to constantly renew their knowledge and skills to respond to the ways in which problems and contexts are constantly shifting (Crowther, 2004:130).

... because we have got far more globalised markets, there are constantly going to be things we need input on. (Managers) are dealing with cross sectional managerial functions ... the content you (as a manager) have learnt (in your MBA) is not going to be fresh anymore. You are not going to be the 'hotshot', there will be another 'hotshot' who just came off the (MBA) programme. What continuous professional development is saying is that in five years' time you need to go back and take some kind of refresher (course) on what has changed and what is different (Interview 4, Executive Education).

Quite obviously one would expect to find education programmes most strongly orientated to the workplace in the Commerce Faculty – and the Graduate School of Business informants articulated the issues most clearly, as noted above.

The language of the business school echoes the discourse highlighted by Gee et al in their discussion of 'fast capitalist texts' (Gee *et al.*, 1996). The Executive Education informant is concerned about 'growing' the knowledge and skills needed to keep managers and business people abreast of rapidly changing economic contexts. But the informant's language conjures up urgency and anxiety – 'you are not going to be the hotshot', 'the content is not going to be fresh anymore'. This is part of the strategy of selling the importance of continuing professional development short courses based on belief in the obsolescence of initial education – in order to stay 'ahead' in the competitive business world, further education is needed.

4.1.2.3 Environmental short course, Science

The Science Faculty short course also arose because of demand for new knowledge from people working in the field which staff of the unit came across while doing environmental consulting work. On a much smaller scale of operation to the GSB, the specialised short course which developed out of that need went on to run successfully for several years, and the offering of short courses was added to the other work of the unit.

¹⁵ The rating she was referring to was awarded for the formal full-time MBA programme, but the 'repeat business' refers to ex-students returning in a variety of ways, especially in the Executive Education short course programme.

(The environmental course was) ... seen as a vehicle for mid-career professionals who came from a variety of backgrounds. They could be engineers, miners, planners, as well as natural and social scientists, lawyers – who were addressing environmental issues in their careers but didn't have any formal training in that discipline (Interview 7, Environmental short course).

In these cases, the primary and most explicit purpose of the short courses was to equip people to do their jobs better, but it arose out of the emergence of a new field – the understanding of environmental issues – which had not been required in past years or been part of initial training.

4.1.3 Social discourse

In Chapter Two the broad definition of the social discourse referred to a notion of education serving the social or democratic citizenship agenda to build a society that respects the equality of all human beings, and to enhance every citizen's capacity to be human and 'to live in a meaningful, fulfilled and useful way' (Martin, 2003:571).

The social or civic purposes of education are not very visible in the informant interviews. But in one interview, the Clinician Educators' short course, the programme was seen as having specific benefits for both the individuals and the broader society.

4.1.3.1 Clinician Educators' short course, Health

The interview from the Health Sciences Faculty provides an example of where Martin's notion of social discourse of lifelong learning is evident. In this case medical doctors enrolled for a course on how to teach more effectively while engaged in medical practice.

They (the participants on the Clinician Educators course) are an amazing group of people – they have so many different teaching roles in different contexts and so much experience. And yet they are so eager to improve how they are teaching – to me, that is lifelong learning. They aren't too worried about whether they get credits, obviously that would be a bonus ... (Interview 5, Clinician Educators' short course).

The informant said that she viewed this course as a perfect example of lifelong learning because the individuals enroll in the course in order to improve their *educator* skills, which are secondary to the purpose of their core work (as medical doctors), but which they see as an important new area of expertise they should develop. During the course, they are expected to attend classes and devote about five hours a week to the course, which, the informant explained, is demanding for a full-time practising medical doctor.

But they are managing to keep up ... (S)ome of them have got in locums (to cover for the time they are taking off for studies), some have shut their practice for that time and are opening on Saturday mornings instead. (Their motivation is) ... not economic – because (the course) is not making them more employable ... (I)t might be that they are really committed to better patient care and (to find ways) they can teach students to do better patient care (Interview 5, Clinician Educators short course).

In this case the doctors appear to be motivated by the desire to deliver better patient care (social development) as well as their personal interest in gaining better teaching skills (developing individual capacity). None of the other informants explicitly considered the social dimension of their programmes to be significant, but several did comment on this in relation to lifelong learning at UCT.

4.1.3.2 Perspectives on the social discourse at UCT

In some of the other interviews, the informants commented more broadly on lifelong learning at UCT including issues of social responsiveness and broadening access to non-traditional learners.

The Diploma in Education informant commented on how she thought the University was interpreting lifelong learning.

The Council for Higher Education (audit) report does say that UCT needs to think about how it is linking with the world of work out there. That is a national pressure on institutions. I think that the social responsiveness project, which has picked up some lifelong learning things (dimensions), is how UCT is defining this (Interview 2, Diploma in Education).

The 'social responsiveness project', which she referred to above, is an initiative taken to document the myriad of ways in which UCT is involved in activities that make a contribution to building society, resulting in the Social Responsiveness Audit report which was referred to in Chapter Three. This informant went on to distinguish between the 'institution' as a whole, and people who work in the institution, suggesting that while 'institutional pressure' is an important influence, it is individuals who will actually make activities happen.

It (UCT) makes statements about the commitment to the community ... (and) there are people who are committed (to this work) but this is a different from the institution itself (Interview 2, Diploma in Education).

This informant very clearly distinguishes between the 'institutional' discourse or statements, and the individuals who 'carry out' or enact these discourses. The language here is about juxtaposing positions – groups, individual agents (the phrase 'there are people', 'individuals' as opposed to the institution, 'UCT', 'it'). In Chapter Five, I attempt to analyse the 'institutional' discourse around lifelong learning, while the question of the relationship between the individuals (or agents) and the Institution is taken up further in the final chapter.

But what about the issue of access within lifelong learning – widening access to higher education? It was not a prominent theme in the interviews. Where it was discussed at all, it was raised by informants as a comment on UCT's lack of consciousness about dealing with accessibility.

In an interview with one of the informants from the Graduate School of Business, the need to improve access was seen as a priority (even though the GSB is mostly a post-graduate programme).

Commenting on how few mature students there were at UCT generally, she said:

But that is because UCT hasn't opened its doors to that (making it easy for mature students to access study options at UCT), it doesn't have a part-time programme, it doesn't have Saturday morning classes or short courses and I think it really needs to go there. I mean UWC (the University of the Western Cape) is way ahead, and even Stellenbosch (University) ... (Interview 1, MBA).

At a policy level, UCT seems to have made a choice not go that route – as explained in the following quote.

Overall, the [CHE Institutional Audit] Panel was left with the impression that RPL is currently a low priority with UCT, with some indication that it is considered irrelevant at undergraduate level. (CHE, 2006, 27)

However, the Centre for Open Learning's mission includes explicitly a commitment 'to make the academic resources of the institution accessible to a wider range of participants' and 'to build capacity of staff to work with adult learners'. In the interview about the Third Term programme, the informant explained how some elements of a social discourse, especially in relation to increasing access, were articulated when the Third Term programme was established. However, he did not think that the vision for the programme was an easily realisable one.

For some people (names two key leadership people) the Third Term project offered a different way for students to learn. A way for the University to offer different programmes – for people who decide to work, and then take one course at a time, and not just the three-year block (Interview 10, Third Term).

The informant commented on how much sense that vision made to him – but in practice, the informant described practical problems which were encountered when trying to implement the vision of the extended provision of credit-bearing courses. A key component of this vision was that current UCT staff would do the teaching (to ensure the courses were of equivalent quality to the mainstream courses). But academics are facing increased pressure to produce research, and even though some staff prefer teaching, the Third Term programme is struggling to find academics who will take on additional teaching in the long vacations – which are earmarked for research. The vision of flexible learning pathways through an expanded Third Term programme has been difficult to realise thus far due to institutional impediments.

The debate about the meaning of access in higher education is a much larger one (Buchler *et al.*, 2007), and although there is some overlap with the research question, I have chosen not to deal with the access debates comprehensively.

4.1.4 Limitations of the simple three-point model

Through the interviews it became clear that the three-point model I developed (see Figure 2: Dimensions of purpose on page 30) and used during the interviews was inadequate to capture the complexity of programme goals or of learners' purposes. Two main criticisms of this model: that it represents the learners' motivations or purposes separately, and the absence of the academic dimension, are discussed below before an attempt is made to revise the model.

4.1.4.1 Rigid divisions

One informant, offering very career focused-education programme in the Commerce Faculty (Interview 6, Modules in a Masters programme), criticised the simple model I offered, suggesting that there may be a myriad of other potential influences on learners' decisions to enroll for continuing education. Clearly some of the dimensions suggested in the model are portrayed too simplistically as 'either'/'or' choices.

Of the all programmes described, only the Summer School offered opportunities for education which had no obvious link to workplace skills. But education primarily for leisure and enjoyment tends to be limited to the upper middle classes who have the time, money and the inclination to spend free time learning for its own sake (Interview 8, Summer School).

The weaving together of the three purposes of education – personal growth, social and economic – is challenging to represent schematically as I tried to do in the initial simple model. Individual motivations cannot be neatly categorised as either learning for work, or learning for personal development.

4.1.4.2 A fourth dimension – academic discourse

The academic discourse has been added as an additional category to the three discourse strands outlined in Chapter Two, arising out of an analysis of the interview data. While there is some ambiguity about whose perspective is foregrounded in the discussion on the other three discourses (the practitioners' or the practitioners' ideas about the learners' perspective), in the case of the academic discourse, it reflects clearly the practitioners' views.

In two interviews (Interview 6, Modules in a Masters Programme, Commerce and Interview 1, MBA, GSB) the particular character of the higher education context is shown to have an impact on how practitioners understand lifelong learning.

- *Modules in a Masters Programme, Commerce*

In the interview about the single modules for which students could enroll in a Masters Programme, the informant worked in a faculty which was especially career-focused – ‘you get a degree to go and do a particular kind of job’. The informant argued that economic need was the clearest driving motivation of learners enrolling for courses in that faculty. She believed that most adults select areas of study which would directly ‘improve their ability to do their jobs’ or if they were not formally employed, then the motivation was ‘to improve their ability to get work’ or to compete for work.

However, the informant saw ‘academic’ as being a distinguishing criterion between full degree study and shorter courses. She distinguished quite clearly between the ‘academic’ programmes (full degrees and post-graduate studies) and short course provision which was an expanding aspect of the work she was involved in. In discussing short courses, the informant emphasised even further the ‘utilitarian and functional component’ of adults’ interest in education. They need access to learning which is intensive and directed specifically at an identified need – not a general up-skilling that might be the focus of some undergraduate degrees.

It is like most adult education, there is a completely utilitarian and functional component to it. I have to know this (set of knowledge/skills) now, and therefore I would like to do this (course). It is not that I am educating myself for the good of my brain (Interview 6, Modules in a Masters programme).

Despite this very functional focus, the informant was at pains to stress the *quality* of the educational offerings, even in short course form.

(The discipline) is a field full of fads – (but) chasing fads and fads that are not academically founded – that is not our work ... in our full degree courses, people have to do the fixed modules – we won’t change them from year-to-year to match the fads (Interview 6, Modules in a Masters programme).

There appeared to be some anxiety about compromising academic excellence in her use of language – the use of the term ‘fads’ implying changeability and lacking in seriousness which is juxtaposed to academic work. This informant has initiated a new set of short courses, which ‘respond to the market’ (Interview 6, Modules in a Masters Programme) and has accommodated the emerging need by designing learning opportunities which stand outside of the existing academic offerings.

The main distinction between the full degree programmes and the new short courses being developed seems to be on improving accessibility in terms of delivery mode.

We will develop short courses for (the subject) where we will go with demand, we will be flexible in being able to teach it here, teach it in your place of work, teach it on-line (Interview 6, Modules in a Masters programme).

In this interview, the overall impression created is that while there is a ‘demand’ and ‘market’ for short courses, both the learners and the nature of the demand are less weighty than the mainstream degree

programmes (noted in the language of ‘completely utilitarian and functional’, ‘fads’, ‘changing from year-to-year’). She captures some of the institution’s own ambiguity – embracing the importance of responding to the need for more flexible learning opportunities while maintaining the main degree programme’s paradigm of excellence, which excludes many potential learners.

- *MBA, GSB, Commerce*

In the other Commerce Faculty-based programme, the Master of Business Administration (MBA), the tension around an ‘academic’ and a more applied, work-based focus arose in a different kind of way. Usually, a MBA programme is open to those with a relevant initial degree and the necessary academic achievement level, but, at UCT, the MBA has the added admission requirement of three to five years’ working experience. It has become a hybrid model – a mix between a formal post-graduate academic Masters degree and a continuing professional development programme.

The Council on Higher Education sees the MBA as an academic Masters, while internationally, it is not, it is a professional (qualification) ... (but) our students have to write a thesis (Interview 1, MBA).

Since business is an applied field, the mainstream academic programmes in the GSB do incorporate ‘experiential-type’ learning although there is a strong pressure to resort to traditional academic assessment methods.

I run an elective where students go and work with small businesses in the township. They do a real business plan with a real business idea and they all do a company analysis ... but it is still exam-based. (Interview 1, MBA).

The informant interviewed was engaged in trying to transform the definitions of ‘academic’ rather than setting up a parallel system.

It took a long time for us to convince them (the Commerce Faculty) that there is academic rigour in action learning kind of programmes which don’t use exams. That was a big shift for commerce (we had to) ... say ‘this is an acceptable way of examining’ ... (they challenge by asking) how do you know that they can do if you haven’t sat them down in an exam and said ‘here, answer these questions’ (Interview 1, MBA)?

It is important to note there is a high degree of agency being articulated in these interviews. Take for example the interview done about the MBA, where the informant uses many pronouns which show the ‘other’ (them, they – referring sometimes to the University, sometimes to the Faculty of Commerce and sometimes to staff within the informant’s own programme). The person being interviewed in this case explained how ‘even our own Faculty¹⁶ here, some of them of them don’t quite understand action learning’. The informant has a vision of a less traditional ‘academic’ Masters degree – but this is not always shared by all who are responsible for the programme. The informant takes on an agency role,

¹⁶ ‘Faculty’ is used here in the American English sense of an academic member of staff.

promoting a particular practice that is not yet shared by very many colleagues in the programme or the institution.

But the very nature and location of the Graduate School of Business does capture the difficulties of straddling the demands of academic excellence and workplace application very acutely.

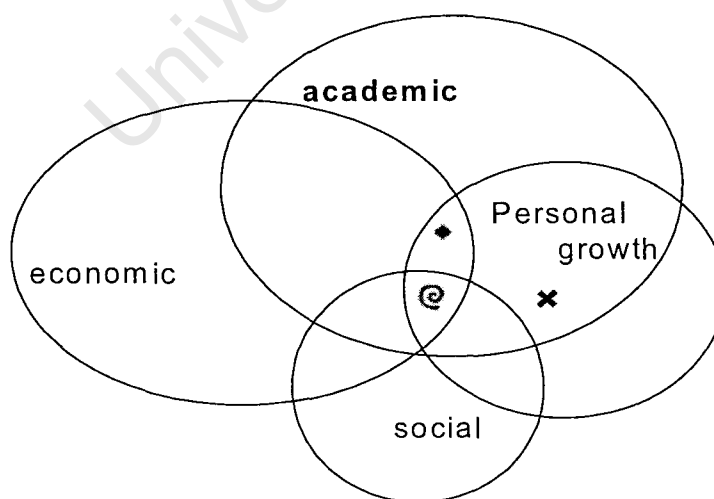
The tricky thing is that when people come to the Business School, they don't want to be taught by an academic; they want to be taught by people with business experience. So you've got to find academics with business experience. (Interview 1, MBA).

When considering lifelong learning in Higher Education, it appears that the academic dimension should be included.

4.1.4.3 Revised model

From the analysis of the interviews, the simple model of lifelong learning I had begun with was clearly inadequate. Not only was an additional dimension revealed, but the three points did not reflect the blending and overlaying of categories. In the revised model represented in Figure 4 below, a particular course can be plotted on the Venn diagram to include, or not, the various purposes considered part of the vision of the dimensions of learning. For example, the Summer School may be plotted in the portion of the diagram where the personal growth and academic circles intersect. The MBA may include academic, economic and personal growth but exclude social, while the Clinician Educators' course could include a bit of all four circles.

Figure 4: New model of dimensions of purpose – including academic



× Summer School

♦ MBA

ⓔ Clinician Educators short course

However, this still feels too static, in that the motivations for learning change and shift throughout a person's life and even in the course of study on one particular programme, and how the various contending purposes inter-relate does not lend itself well to a schematic representation. The difficulty being revealed here is that any discussion of educational purpose cannot usefully be limited to one dimension – the challenge is to develop an understanding of learning that will both reflect and illuminate the various 'investments' in lifelong learning by learners and programme designers.

In the next section, I reflect on the contextual factors which practitioners saw as shaping their programmes.

4.2 Perceptions about contextual factors

From analysing the interviews, I identified three issues which were mentioned by several of those interviewed, and I discuss these as themes: the difficult issue of *educational funding and income generation*, the *changing social and political context* in South Africa (including some focus on education policy specifically), and UCT's particular *institutional character*.

Not all the interviews raised all the themes, but the three I identified relate broadly to the contextual themes in Chapter One.

4.2.1 Funding and income generation

Funding pressure has been noted as a growing problem for universities world-wide (Duke, 2002; Subotzky, 1999; Muller, 2003; Field, 2006). Money is now a critical concern of university administrators, whether this is in relation to student fees, research contracts or the 'third income stream' (from short courses).

When looking at institutional perspectives on lifelong learning, there are two competing pressures: firstly, the University cannot justify extending opportunities for part-time study when it has been told to cap enrollment of students and improve the throughput of students currently registered.

But secondly, the University urgently needed to look for sources to generate new income¹⁷, and short courses, professional development, Summer Schools and Third Term courses were identified as offering considerable potential to make money (see UCT, 2004a). This income-generating approach to non-degree based educational offerings also emerged as the purpose for initiating programmes from the faculty level. The competing pressure to find ways of successfully capturing the lucrative

¹⁷ For example, securing the financial sustainability of the University featured as one of the 10 priority areas for the *Vision 2001 and Beyond* document.

educational market, while at the same time not accommodating part-time students in formal programmes, runs as a theme through the interviews.

In three of the interviews – Interview 8, Legal education short courses, Law; Interview 4, Executive Education, GSB and Interview 3, Continuing Professional Development, EBE – the decision to initiate short courses was explicitly linked to opportunities to generate income for faculties.

For example, the Executive Education unit at the GSB was set up to offer short courses and given the task of generating 40% of the running costs of the larger operation; 'It is a profit centre, not a cost centre' (Interview 4, Executive Education).

While short courses in various forms have been offered through faculties at UCT for many years, there is an increasing drive to formalise continuing education based on the dual need to capture income being generated by lecturers running courses 'on the side' and to protect the reputation of the Faculties and the University. In the faculty of Engineering and the Built Environment, informants working in the Continuing Professional Development Programme explained how concerns about use of UCT's resources and 'brand', as well as a desire to generate income galvanised the Faculty into formalising the work around short courses.

He (the Dean) was saying that he used to open the paper on a Saturday morning and see a huge advertisement for a course based in the (that) faculty that he had never heard about. He just wanted to know about it (Informant 2, Interview 3, Continuing Professional Development, EBE).

The issue of income generation was raised in many of the interviews and reflects the growing trend being felt in all tertiary institutions internationally facing reduced state funding – the pressure to 'make money out of education'. While this trend affects all university programmes, non-core areas – short courses, continuing education, professional development, programmes for occasional students, and extension to non-core students – get the pressure to generate profit from education most explicitly.

4.2.2 Changing socio-political context

A common theme in the interviews was the new challenges and demands arising from the contemporary socio-political context of South Africa. These varied from being very direct and arising out of the immediate environment – for example, changes impacting on course curriculum due to the national educational reforms – through to more diffuse changes such as the opening up of more spaces for critical debate.

The Clinicians' Educator short course arose because ordinary doctors who did teaching at UCT were challenged by the transformation of the Health Sciences curriculum. In this example the changes were being experienced at every level (from national policy decisions, right down to the way UCT medical

students get taught, and to the doctors' practice in the clinics). The informant spoke about how curriculum changes have been the main impetus for doctors who do teaching to request a course on how to teach. From this interview, it is possible to see how although the changes originated from macro-policy changes and educational policy, the impact was experienced in a practical way in the teaching curriculum and style.

In another interview (Interview 8, Summer School, CHED), the focus was on how the socio-political context shifted the 'spaces' for public debate and impacted on the educational programme.

The shifting political environment gradually changed the role of Summer School during the 1990s. Under the repressive Apartheid era, the University's public education programme was able to provide a somewhat protected space for dissenting political voices to be heard. The changes were gradual. The informants commented about 'political' topics which are no longer so popular in the Summer School programme. Even though its more overt high-ground of social purpose has declined since the democratisation of South African politics, the Summer School is the only remaining bearer of the 'old-fashioned English, extra-mural idea that there should be a light at night. The lights (of the University) should be on and that people should be coming' (Informant 1, Interview 8, Summer School, CHED).

However, mounting financial pressure has to some extent been used to erode this social purpose of continuing education. The commoditisation of education dominates the current discourse – the 'discourse of accountancy' (Edwards, 1997) – where expenditure must be linked to 'cost centres', where courses are now 'marketed' and where there is competition with other educational 'providers'.

In the next section, a critical question will be considered about how UCT's particular institutional character has influenced the way in which lifelong learning is understood and practiced.

4.2.3 UCT's institutional character

It was noted in Chapter One that the institutional character and identity of universities plays an important role in shaping how lifelong learning is interpreted. Where promoting continuing education does intersect with UCT priorities, it makes sense that the institution will embrace possibilities. The two most obvious areas where continuing education can support the core business of UCT are, firstly, generating additional income to support more traditional teaching, and secondly, increasing throughput of students by offering quick routes to completion of outstanding courses. The discussion on this theme focuses on the COL and draws mainly on two interviews with informants from the Third Term and Diploma in Education programmes.

The increasing concern about 'throughput' of students and the potential lucrative income from increasing enrolment in the Third Term were two of the major motivations for the founding of the Centre for Open Learning. But, aside from very pragmatic concerns, some of the original conceptualisation *did* focus on increasing the flexibility of study options for students to be able to fit their studies around other priorities.

My understanding is that there was a concern about throughput initially; some people took years and years to get through ... (And) they saw the money-making possibilities in it. It (also) offers a way for the University to adapt to the different needs of people (Interview 10, Third Term, CHED).

In terms of lifelong learning, the purpose of the COL splices together a very instrumentalist view (essentially to 'market' education to make money by trading on the institution's reputation) with a humanist perspective (individual personal growth through education) along with a challenge to traditional academia (to become more 'responsive' to national and regional government imperatives). In creating this centre, UCT has attempted to respond to the growing exogenous pressures for change which the institution is not able to incorporate into its main functioning.

One informant juxtaposed the institution (UCT) and the individuals who make up the institution ('people') – who are really its agents.

The key thing is, yes, institutional pressures are put on people, but UCT is one of those institutions which are driven by people who have a lot of academic freedom and individuals play a large role. You have to recognise change comes from drivers but that individuals carry it out (Interview 2, Diploma in Education, Humanities).

How these two aspects (the individual agents and the institutional 'position') relate around lifelong learning is explored further in the following two chapters.

4.3 In summary

This chapter outlined the data from the interviews, focusing firstly, on several 'practitioner discourses' (section 4.1). The three discourses identified in the reading of literature on lifelong learning in Chapter Two – economic, humanist and social – were also found in the interviews. It important, however, to note that the discourses sometimes blurred and intersected with each other when practitioners talked about a particular course. This was especially evident in the way in which the personal growth (humanistic) discourse intertwined with the economic or career-orientation of many people's approaches to learning or studying later in life.

In the second part of that analysis, I evaluated the simple model of purpose and proposed a revised model to include the additional dimension which was a concern about academic achievement. The

simple model had served as a useful vehicle for the discussion on lifelong learning in the interviews, but the blurring and changing of learning purposes was difficult to place into a two-dimensional model.

In the final part of the chapter (section 4.2), I reflected on how informants saw factors influencing their programmes' development, as well as some broad ideas about the institution itself. Although there were many factors, I identified three which occurred in several interviews *and* which resonated with the themes I had identified in Chapter One on context

The practitioner data has particular significance because it reflects the perspectives of the 'agents' of the institution. As noted by Addleson (1996), even very large institutions only operate through their people, who are able to shape the institution. It is through the actions and words of individuals and groups that reality gets created (Cameron, 2001).

In this chapter, the analysis attempted to draw out of the interviews how the practitioners see the work they do. In the next chapter, the second set of data, drawn from the University documents, will be analysed in relation to the research questions.

CHAPTER 5

5. ANALYSIS OF OFFICIAL INSTITUTIONAL DISCOURSE

In this chapter official publicly available UCT documents or ‘texts’ will be analysed looking for ‘institutional’ discourses. I use tools borrowed from the critical discourse analysts (as described in section 3.5.2) to look at the language of the documents and to probe meanings. Three documents were analysed. The documents selected were the UCT Mission, the Quality Assurance Policy Framework for Continuing Education courses (hereafter referred to as CE policy) and the Policy on Recognition of Prior Learning (or RPL policy). The Mission Statement is a high profile document which puts forward a ‘public face’, while the latter two documents are working policies (available on UCT website under “policies”) which in some way address the issues of direct concern – the ability to study at UCT at various stages of life. Although I use critical discourse analysis in all cases, each document is approached slightly differently, as will be explained during the analysis.

5.1 UCT Mission statement

The UCT Mission Statement captures the most public face of UCT, and deserves special attention, since it can be said to represent the current dominant concerns of the University. I am using the documents to find the ‘voice’ of the institution which is essentially an analytical strategy. The problem is that this approach can be accused of treating the Mission Statement and other documents as fixed or absolute statements. Documents are also created by individuals and are, as such, as much objects of contestation and open to interpretation as the interviews are. As Cameron (2001) argues, language and texts are a discursive construction of reality. However, despite these complexities, I would argue that the Mission Statement offers a useful starting place to examine what the University puts forward about lifelong learning.

UCT Mission Statement

Our mission is to be an outstanding teaching and research university, educating for life and addressing the challenges facing our society.

Educating for life means that our educational process must provide:

- a foundation of skills, knowledge and versatility that will last a life-time, despite a changing environment;
- research-based teaching and learning;
- critical enquiry in the form of the search for new knowledge and better understanding; and
- an active developmental role in our cultural, economic, political, scientific and social environment.

Addressing the challenges facing our society means that we must come to terms with our past, be cognisant of the present, and plan for the future.

In this, it is central to our mission that we:

- recognise our location in Africa and our historical context;
- claim our place in the international community of scholars;
- strive to transcend the legacy of apartheid in South Africa and to overcome all forms of gender and other oppressive discrimination;
- be flexible on access, active in redress, and rigorous on success;
- promote equal opportunity and the full development of human potential;
- strive for inter-disciplinary and inter-institutional collaboration and synergy; and value and promote the contribution that all our members make to realising our mission.

To equip people with life-long skills we must and will:

- promote the love of learning, the skill of solving problems, and the spirit of critical enquiry and research; and
- take excellence as the bench-mark for all we do.

We are committed to academic freedom, critical scholarship, rational and creative thought, and free enquiry. It is part of our mission to ensure that these ideals live; this necessarily requires a dynamic process of finding the balance between freedom and responsibility, rights and obligations, autonomy and accountability, transparency and efficiency, and permanence and transience; and of doing this through consultation and debate.

<http://www.uct.ac.za/about/intro>

Adopted on April 24, 1996

I approached this text with the lens of the critical discourse analysts looking for language and words which referred to the discourses that had been identified during the research process and documented in the preceding chapters – namely, the humanist, the economic, the social and the academic. I have reproduced the full Mission Statement above. Looking at the opening sentence – ‘Our mission is to be an outstanding teaching and research university, educating for life and addressing the challenges facing our society’ – it is possible to identify within it, several ‘discourses’ or strands of discourse which seem to co-exist, not always coherently.

It is notable that this one conceptually dense sentence (the first line of the Mission Statement) is often used as a shorthand reference for UCT, and may be found on its own at the bottom of official University documents – for example, the 2007 admissions applications documents.

I will use this opening sentence to discuss the whole document in relation to the following three discourses: a) the academic discourse – contained in the phrase ‘outstanding teaching and research university’; b) an economic discourse (blended with a humanist discourse) contained in the phrase ‘educating for life’ and c) a form of social discourse, found in the phrase ‘addressing the challenges facing our society’.

5.1.1 Academic discourse – The tradition of the academy

One would expect to find the academic discourse in official university communications since the university is today’s incarnation of the old European academies. The academy is traditionally about learning, teaching and the pursuit of knowledge. The classical institutions of learning emphasised the importance of finding the ‘truth’, of training the mind to think critically, of intellectual rigour, and doing all of this while being removed from everyday life. This separated space was seen as a way of creating a repository of wisdom and knowledge in the minds of scholarly individuals who could serve as resources for society, but who had no obligation to any particular political or social group.

What is interesting about the UCT documents is that the ‘academic discourse’ is often articulated alongside *other discourses*. For example, the Mission Statement opens with the sentence which identifies the core academic role as being ‘to be an outstanding teaching and research university’ in the context of the other more political roles of education namely, serving society and the economy (‘educating for life and addressing the challenges facing our society’). In crude, quantitative terms, of the 12 bulleted points in the Mission Statement, four relate to ‘pure’ academic concerns:

- research-based teaching and learning;
- critical enquiry in the form of the search for new knowledge and better understanding
- claim our place in the international community of scholars;
- promote the love of learning, the skill of solving problems, and the spirit of critical enquiry and research.

In many of the other points, the language and values of the academy can be seen, but these are expressed in relation to other social and political concerns.

For example:

We are committed to academic freedom, critical scholarship, rational and creative thought, and free enquiry. It is part of our mission to ensure that these ideals live; this necessarily requires a dynamic process of finding the balance between freedom and responsibility, rights and obligations, autonomy and accountability, transparency and efficiency, and permanence and transience; and of doing this through consultation and debate.

The first sentence is a statement of traditional academic values. The rest of the paragraph highlights the contradictions being faced by universities which must try to both honour that liberal academic tradition while simultaneously meeting the challenges for relevance, application and responsiveness arising in modern societies. Lifelong learning has a much broader interpretation than traditional academic education – it embraces a wider kind of learning in both content (not necessarily disciplinary or theoretical) and location (not only in a formal education setting). Even the traditional academic approaches to university education are being shifted by the demands arising from the new context – for example, the inclusion of service learning, and the incorporation of applied knowledge and skills training in academic curricula are part of the transformation of higher education (see Chapter One). Thus, the discourse of the academy does not speak directly to the embracing of lifelong learning, but the re-interpretation of what the academy means can include a focus on lifelong learning.

5.1.2 Economic and humanistic discourse – the demands of the modern world

On first reading, the ‘educating for life’ phrase resonates with the language of lifelong learning, and the first section of the Mission Statement outlines what is meant by this phrase.

Educating for life means that our educational process must provide:

- a foundation of skills, knowledge and versatility that will last a life-time, despite a changing environment;
- research-based teaching and learning;
- critical enquiry in the form of the search for new knowledge and better understanding; and
- an active developmental role in our cultural, economic, political, scientific and social environment.

As discussed in Chapter Two, lifelong learning can be analysed in terms of two dimensions, time and purpose (Abukari, 2005). The ‘educating for life’ description contained above implies ‘lifelong’ in the sense of an education that will *prepare* the student for what awaits them in the future. This Mission Statement, adopted in 1996, was written for current educational provision where young adults come to university to receive tertiary and professional education in preparation for working life. At the level of the text itself, the term ‘foundation’ suggests the basis or beginning of education, and that whatever is learnt at UCT is the beginning of a larger process. Here the commonality with the concept of lifelong learning which has an embedded understanding about continuation – about a pathway – is apparent.

There is more language of lifelong learning in the penultimate paragraph.

To equip people with life-long skills we must and will:

- promote the *love of learning*, the skill of *solving problems*, and the spirit of *critical enquiry* and *research*; and
- take excellence as the bench-mark for all we do.

(Emphasis added)

Graduates are being prepared to leave UCT with skills that will endure. The skills which are identified to last a lifetime are the generic meta-cognitive capacities of problem solving, knowing how to learn ('love of learning'), critical thinking ('the spirit of critical enquiry') and the ability to find information and evaluate it ('research' skills). These are also the skills which have been identified as having the most economic currency in the modern working environment (Delanty, 2001; Castells, 2001a).

Interestingly, if closely analysed, the selection of the terms in the Mission Statement's elaboration of 'educating for life' offers a close match to the requirements of the modern worker as identified by, for example, Castells' (2001a) highly skilled, flexible 'self programmeable worker' who is able to create new knowledge and continuously learn new skills as the work environment changes. The words strongly evoke the vision of endurance in a dynamic world – 'skills, knowledge and versatility' that will 'last a life time' in a 'changing world'. As with Gee's examples (Gee *et al.*, 1996: 26), it can be argued that the Mission statement also provides a 'textual creation of a new Discourse' which emphasises active knowledge and flexible learning, and responsibility of the worker to constantly improve him or herself – echoed here by the Mission Statement's stated commitment to search for 'new knowledge' and 'better understanding'.

Liberal adult education upheld the value of education to improve the quality of people's lives, often containing ideas of personal-political empowerment. In today's world, this vision has, in many ways, changed into the power of education to give individuals the 'edge' against others in the employment market. The discourse of 'personal growth' is not easy to isolate from the more general discourse of preparing oneself for the modern world. In one clause of the Mission Statement, the personal growth aspect of education is given explicit mention: 'to promote ... the full development of human potential', but through the education process, the individual student must gain the various skills such as 'critical enquiry' and even some characteristics, such as a 'love of learning'. 'Personal growth' is the method as well as an outcome of the education – in order to end up a better person, better equipped personally and professionally for the modern world.

5.1.3 Social discourse – addressing the challenges of society

The remaining clauses contained in the description of 'Educating for life' indicate a broader than purely economic purpose. For example, in the phrases 'promote equal opportunity' and

‘developmental role’, it is possible to identify a third discourse. However, the language used here is not quite the same as the ‘social’ discourse identified in Chapter Two, which focused to a greater extent on democracy and social justice aspects of education. It may be more accurate to represent this as a ‘social responsiveness’ discourse. The concept of social *responsiveness* incorporates a wider range of purposes – including ‘responsiveness’ to business and political agendas.

It is most clearly articulated in the bullet point about what ‘educating for life’ means:

- an active developmental role in our cultural, economic, political, scientific and social environment.

A phrase like this represents a major shift in the traditional view of the University – placing the University in both a new role (developmental) and position (no longer standing aloof from society). This probably offers one of the deepest challenges to classical university education (since ‘academic’ used to be seen as opposite to ‘applied or practical’), and in many ways the increasing importance of education throughout life (i.e. lifelong learning) is about the applied and practical, as well as the personal development aspects of learning.

The following clauses of the Mission Statement also speak to the social responsiveness role, but they are very strongly referenced to the socio-political context of South Africa in the 2000s.

Addressing the challenges facing our society means that *we must come to terms with our past*, be cognisant of the present, and plan for the future. In this, it is central to our mission that we:

- recognise our *location in Africa* and our historical context;
- *claim our place* in the international community of scholars;
- strive to transcend the *legacy of apartheid* in South Africa and to *overcome all forms of gender and other oppressive discrimination*;
- be flexible on *access*, active in *redress*, and rigorous on success;
- promote *equal opportunity* and the full development of human potential;
- strive for inter-disciplinary and inter-institutional collaboration and synergy; and value and promote the contribution that all our members make to realising our mission.

(Emphasis added)

This highlights another aspect of social responsiveness concerned with equity and redress. The language used in these phrases above is more active in evoking powerful concepts around redress and equity in the context of South African (and African) history. It is notable that in this section of the Mission Statement, there is more prominent use of emotive language (for example, ‘come to terms with our past’ ‘claim our place’, ‘overcome ... oppressive discrimination’) and inclusive pronouns (‘our’ and ‘we’) which represents the university as an idealized, *united* entity. The language draws on other moral discourses known to many South African readers – the ideologies of African renaissance, of reconciliation and justice and of redress.

While the Mission Statement tries to capture the main ethos of the University, the analysis of the language reveals the multiplicity of strands of discourses which are operating within the Institution. Rather than expecting to find a consensus and a single identity in the Mission Statement, it may be a more realistic approach to consider using Readings' (1996) concept of envisaging 'the University as a community of dissensus' (as described in Delanty, 2001: 7).

The community of dissensus does not seek an idea of identity, a consensus on the nature of knowledge, or a meta-narrative of unity ... Thus rather than seeking the unity of culture ..., the point is to institutionalize dissensus and to make the University a site of public debate ... (Delanty, 2001:7).

From the discussion of the next two documents, it becomes even clearer that it may not be possible to argue that all texts reflect the same discourse, even when they are officially sanctioned policy texts from the same institution. In the next section, the first of the policy documents, the Continuing Education Quality Assurance policy will be analysed and since it is mostly comprised of detailed procedures, I will look at its use of language and its content areas.

5.2 Quality Assurance Framework for Continuing Education courses

The Quality Assurance Framework for Continuing Education courses policy (UCT, 2004b) (hereafter, CE Policy) was adopted in 2004 to guide the development of short courses at UCT. It comprises six pages with 13 sections – extracts are used to illustrate points made in the discussion, and the full document can be found in Addendum F. The adoption of the policy represents in many ways the embracing of the importance of new, extended forms of learning which have been going on for many years informally through individual academics and departments.

There is a long tradition within higher education institutions throughout the world of provision of a wide range of 'outreach' courses, projects and programmes which fall outside of provision of formal qualifications ... In line with international trends the overarching term 'continuing education (CE)' will be used in this policy. This policy will cover all CE courses which are less than 120 credits or 1 200 hours (extract from 'Definition and scope').

There are several noteworthy features about this policy text. Firstly, it is the only public policy text I could find which deals *specifically* with short courses or continuing education. UCT's Webpage lists nearly 40 policy documents under the 'about us/policies' heading which cover a range of operational concerns ranging from assessment, to plagiarism, to HIV, to rules for the use of e-mail.

The appearance of a document dealing exclusively with continuing education can be interpreted to mean two things – continuing education is not dealt with alongside the general educational work of the University, and, it has assumed enough importance to require a dedicated policy.

Secondly, the policy is concerned almost solely with the 'quality assurance' of continuing education. This is the only public text where UCT defines what it means by 'continuing education' – and it is in done in relation to its 'quality control'. This echoes the earlier discourse theme of academic

excellence, discussed in relation to the Mission Statement earlier and in Chapter Four. Of the 13 sections in the document, nine deal with controls for the approval, monitoring and recording of courses. The academic discourse was visible in several itemised sections – for example, section 3 is entitled ‘Academic Accountability’, where the monitoring of the ‘academic’ quality of learning is flagged, and there are quite a number of references to the formal academic assessments required for any credit bearing courses.

However, this policy was fairly narrowly focused on the regulation of short courses – with most points in the policy giving detailed instructions about what can be done and I found there was little scope for identifying the other discourses discussed in Chapter Four.

The application of discourse analysis to this document requires a different approach to that used to discuss the high profile Mission Statement. The language and text intention in the Mission Statement is about creating an image or representing a common community. The CE Policy document has a more functional purpose and uses less descriptive language and fewer forms of direct appeal to the reader. Therefore, my analysis here focuses far more on the contexts and processes of production (and interpretation) although, these can only be surmised since there have been no interviews done with the people involved in the text production.

Referring to Fairclough’s diagram (see Figure 3, on page 33), the context or the ‘social conditions of production’ are critical to the understanding the CE Policy text. The preamble describes why the CE Policy at UCT is necessary and captures in some way, the difficulties being experienced in integrating the operation of higher education with the single qualifications framework envisaged in the NQF. The formal university degree programmes are monitored and registered through the national body which oversees the quality assurance for higher education – the Higher Education Quality Committee (HEQC). However, short courses have fallen outside of the formal accreditation system operating in higher education.

... The South African Qualifications Authority (SAQA) policy is that all short course providers are required to initiate the accreditation process with their Education and Training Quality Assuror (ETQA). SAQA has specifically requested the Higher Education Quality Committee to develop criteria for the quality and standards of short learning programmes, and to include short learning programmes in the institutional audit system for the higher education sector. (Preamble, (UCT, 2004b)

The preamble goes on to describe what is being proposed – that an HEQC institutional audit will lead to self-accreditation status being given to higher education institutions for short courses *if* they meet the criteria for quality management. This CE Policy document can thus be seen as offering evidence that UCT is implementing a quality assurance system for its short courses.

The first two sections provide definitions (setting the context in the ‘preamble’ and defining what is meant by CE in the ‘definition and scope’). The main body of the text (nine sections) comprises the

rules and regulations, and the two final sections ('staff development' and 'access to facilities') are of a supplementary informational nature.

From the examples given below, the 'modality' or tone of the text can be seen as strongly regulatory. While the documents are not comparable in terms of length or purpose, it is interesting to note that in contrast to the Mission Statement¹⁸, the inclusive pronouns 'we', 'our' and 'us' do not occur at all. Although there is no 'identity' or speaker made explicit in the text ('agentless passive constructions' Fairclough, 1999:205) the language evokes the authority of the University and is expressed in terms of imperatives and 'modalities of obligation' (Starfield, 1999). The verb 'must' occurs 25 times in the 13-page document, 'should' 16 times and 'will' 23 times. The text directs the reader to submit to various university authority structures – such as the Dean, the Head of Department, the Faculty Board and the Senate Executive Committee. In the instance of the CE Policy text, the identity of the 'ideal reader' appears to be a member of staff of UCT being addressed by the 'persona' of the institutional authority.

The text is written in the passive voice – about the enactment of things. The subject in the sentences most commonly takes the form of things – 'the courses', 'the proposals', 'the decisions' or 'the applications'.

4. (c) The course must have a formal scheme of assessment which is open to external scrutiny ...

4. (e) The application must provide evidence of the quality management systems in place ...

5.2. The proposal form must contain details of how the course is aligned with UCT's mission and strategies.

5.3. The primary decision about whether it would be possible for short courses to enable learners ...

When people are mentioned, it is to instruct how the enactment of things should take place – whether this is instructions to the Dean of a faculty:

3.1. The Dean is accountable for assuring the academic quality of all continuing education courses ...

11.1 The Dean of the faculty must undertake a review of the faculty's short course activities annually.

Or about a student:

6.1 Students who successfully complete any credit bearing short courses will not be entitled to automatic access into the full-time programmes.

¹⁸ In the Mission Statement, 'we' occurred five times and 'our' occurred 13 times in a document of less than a page in length.

10.1 Only students who have fully met the requirements of the short course may be issued with the relevant certificate.

Although the Dean of a faculty is a senior management figure in the University, in this text, the Dean is clearly subject to a higher power. This policy document delegates responsibility for regulation and *control* of the quality of short courses to Deans.

Using Fairclough's (1999) analytic approach, it could be argued that there is a concurrence between the social context and the processes of production; the national political agenda of bringing the higher education institutions more in line with other educational provisioning and controls (that is the social context) with internal anxieties about what is legitimate academic activity at UCT (that is the what drove the production of the policy). The result is a policy that comes across as quite restrictive and controlling. The language and content seem to suggest that the writers are concerned that continuing education may be of poor quality and that continuing education courses could undermine the good standing of UCT qualifications. It seems to reflect the ambiguity about continuing education – a recognition that there is a demand for this kind of education (which goes ahead even without official sanction), but a fear that it will either undermine the institutions good standing or detract from UCT core priorities.

For example:

4. (e) The application must provide evidence of the quality management systems in place to assure the quality of provision. The systems should cover arrangements for quality assurance, quality support, quality development and improvement, and quality monitoring and evaluation.

And in section 11 on monitoring.

6.2. Students who wish to attain credits from appropriately designed courses must register as bona fide students. The faculty office must ensure that the normal admission requirements are met, including the completion of any AARP¹⁹ tests that may be required, or that proper RPL assessments have been done in line with the RPL policy, before any student is registered for a potentially credit bearing course. The students would register either as occasional students or as students on a programme not approved by the minister for funding.

The purpose of these regulations is to ensure the quality of the learning programmes offered through UCT. UCT has very well defined and stringent requirements for admission, so aside from the obvious hurdle of finding the money, many people will not be able to gain entry based on their prior school performance. World-wide, continuing education has provided an access point into tertiary education for more non-traditional students – i.e. people who have not accessed higher education due to factors such as lack of time, money, formal qualifications, preparation or confidence (Buchler *et al*, 2007) However, there is little provision for the articulation of continuing education courses with the formal UCT programmes.

¹⁹ The Alternative Admission Research Project (AARP) administers tests to assist with admissions and placement of students.

Yet there is considerable demand for formalisation of continuing education and links into formal higher education. This is where some of the tension between access and excellence arises – maintaining academic quality places restrictions on access into higher education.

The issues being faced around access are discussed in greater detail in relation to the next text which was selected – the policy on the Recognition of Prior Learning.

5.3 The Recognition of Prior Learning

The UCT policy on the Recognition of Prior Learning (hereafter referred to as the RPL policy) (UCT, 2004c) is reproduced in Addendum G, and relevant extracts appear in the text below to assist the analysis. As mentioned in the previous section, the social conditions in South Africa are placing enormous contradictory pressures on universities to increase access to those who were previously disadvantaged under Apartheid, as well as to improve the rate of graduate output and to contribute to ‘the social, cultural, political and economic development of its citizens’ (Council of Higher Education quoted by McMillan (2003:7).

The RPL policy was adopted in 2004, and seems to have arisen out of similar conditions as the CE Policy discussed above: namely, the establishment of the COL, and external pressure from the HEQC.

Recently UCT’s Council approved the establishment of a Centre for Open Learning. UCT recognises that there are significant opportunities for expanding the use of RPL to enable access into post-graduate programmes, articulation from other types of learning pathways, and continuing professional development programmes or short courses. The HEQC is also requiring institutions to provide evidence of an institutional RPL policy. To address the policy vacuum and to provide an enabling environment in which student access to UCT can be expanded through RPL, UCT has developed a comprehensive policy on RPL. (Preamble, RPL policy, 2)

However, despite a similar context and time of origin, the documents differ quite markedly in their tone, structure and modality. As noted earlier, the CE Policy focuses almost exclusively on quality assurance, while the RPL policy has quality assurance as only one of the eight main sections of the policy.

Fairclough (1999) argues that discourse analysis needs to include detailed textual analysis and Figure 3 on page 33 offers a useful framework for this discussion. It is possible to see the RPL policy as a text which is developing a practice that does not yet fully exist. Both the words used and the topics covered indicate a more developmental approach underpinning this policy. In the 13-page RPL policy there are only six uses of the verb ‘must’, but 22 instances of ‘will’. The tone of the text

is more encouraging and more tentative – implying that this is a policy still emerging. It offers ‘guidelines’ (section 4 is entitled *Guidelines for RPL process*) rather than strict regulations. It outlines *possible* approaches which could be adopted to implement RPL but unlike the CE Policy, it is not stated in absolutes.

4.2. In future, *it may be possible* for the COL to take candidates through a portfolio-development and RPL assessment process ... (Emphasis added)

This clause recognises that current capacity may change and expand – the policy allows for a future scenario, but does not imply that it has to happen.

5. RPL must be used in ways that *allow students a reasonable chance of success* in their studies, and *provide sufficient academic support ... and supportive pedagogical interactions*. (Emphasis added)

Here the obligation is placed on the institution (the term ‘must’) to make the RPL process an enabling experience – expressing both moderation and a positive attitude (‘a reasonable chance of success’). As Fairclough (1999) points out, what is written down is a choice which excludes other options – the modes and forms of expression here suggest an approach which assumes a positive developmental outcome of the policy’s implementation. The same idea could have been expressed in a more negative or regulatory tone. In contrast, a different choice of language was highlighted in the analysis of the CE Policy. There are also many descriptions of the support required to make the RPL Policy workable²⁰ – above in clause 5, the provision of academic support and ‘supportive pedagogical interactions’ make assumptions about support. However, elsewhere, there is explicit recognition that the policy outlined may not be implementable.

6.1 ... departments ... are responsible for ensuring that academic staff have access to appropriate training and professional development, *where available*. (Emphasis added)

This rider clause, ‘where available’ certainly implies it may *not* be available.

The section on RPL Assessment Methodologies includes some interesting contrasts in which it is possible to track various discourse strands operating in the institution, and even in broader society.

RPL assessment methodologies should be chosen based on their appropriateness to a particular context, learner, discipline, and programme. They may be chosen by the individual assessor or by those in the leadership of the programme in question. While the choice of methodologies is ultimately an academic function, UCT recognises the importance of learners’ input into the decision-making process. The choice and use of a given set of RPL methodologies must be consistent with the UCT principles of assessment more generally. (extract from Section 7. RPL Assessment Methodologies, p.5)

²⁰ The word ‘support’ occurs 15 times in the policy text.

RPL has not been widely practised at UCT and does not have a single, established methodology. In this section, various possible forms of assessment are laid out (see Section 7, p. 4 & 5) and thus, the policy reflects some openness – ‘assessment methodologies should be chosen based on ...’ and ‘... (methodologies) may be chosen by the ... assessor or ... the leadership of the programme ...’ And even, ‘recognizing the importance of learners’ input into the decision-making process’. In the mainstream academic programmes, ‘objectivity’, distancing of the marker from the individual student, anonymity, external moderation (further distance and anonymity) are held up as the benchmarks of good assessment practice. In this document, the RPL assessment process is presented as a subjective, partnered approach between the ‘assessor’ or ‘programme leadership’ and the student. The two latter sentences in the above quote capture quite sharply the way in which texts can represent the struggle for control over discourse. The writer/s of this text has placed ‘UCT’, the institution, in the position of both ‘recognis(ing) the importance of learners’ input into the decision-making process’ as well as asserting that ‘the choice and use of ... RPL methodologies must be consistent with the UCT principles of assessment more generally’.

Several of the statements in the RPL policy are put forward confidently claiming an institutional identity which may not yet actually exist, and suggest that the text producers are using the process to ‘create a new Discourse’ (Gee *et al.*, 1996:26). For example:

There is a commitment at UCT to redressing inequities and supporting lifelong learning through widening access to adult learners. This commitment is based on a belief that there are able people with valuable knowledge and experience in workplaces and communities who could benefit from university study. (Extract from the Preamble, RPL policy, p.2)

And even more explicitly:

RPL is based on a developmental model, not a deficit model of adult learning. It (RPL) aligns with *existing UCT practices for opening access* to tertiary study through alternative means and builds on the knowledge and skills adults have already acquired. (Extract from Section B: Critical issues relating to RPL, section 2. Further details on principles of RPL, p.6 – emphasis added)

However, other texts articulate a different version of UCT’s priorities, for example, the Executive Summary of the CHE Audit of UCT concludes from its study of UCT documents that RPL seems to be almost irrelevant at undergraduate level (CHE, 2006: 27). The audit reports suggest this to be ‘difficult to reconcile with phrases in the UCT mission statement which refer to wanting to be as flexible in access, active in redress and rigorous in success’ (CHE, 2006: 27).

To be accurate, both of the documents quoted above do acknowledge that adult learners could be recruited for postgraduate level studies – in line with the institutional plan to increase the level of postgraduate enrolment at UCT (see for example (Ndebele, 2000) – but the RPL policy explicitly suggests that it can be used to open access at *all levels and asserts that opening access is existing practice*. However, the point remains that these texts arise out of the current social conditions and

pressures described in Chapter Two. As Fairclough (1999) emphasises (ibid:183–206), the analysis of the processes of production and interpretation illuminates the connection between the language and the social context. These texts are produced by people located in the institution who are engaged in ‘mental struggles’ which lead to particular identities, values and ideas being written into the text (Ivanič, 1997). It is the process of writing which ‘connects the wider social context to the words on the page through the head of the writer’ (ibid). In the case of policy documents, there are likely to be several ‘writers’ and therefore, a more negotiated construction of reality. Aside from the tone and modality, looking for ‘intertextuality’ (Fairclough, 1999; Cameron, 2001), or the borrowing from other genres, can show the connections into the broader social processes.

Picking up on the earlier analysis, there are several discourse themes identified in the RPL policy text. They are not identical to the ones analysed in the Mission Statement (in section 5.1), although there is overlap. The discourses discussed in relation to this text are: a) academic; b) economic; and c) social which in this text takes on an extra dimension of equity and redress.

5.3.1 Academic discourse

The discourse of the academy, as discussed in the earlier sections, has a very interesting presentation in this text. The unique nature of university education (versus other kinds of learning) is given emphasis – described as ‘academic knowledge and skills’ (p.6), ‘academic ways of knowing’ (p.7), ‘academic knowledge and discourse’ (p.7) and ‘disciplinary discourses’ (p.5). Academics are recognised as having the specialised skills to assess whether ‘other’ kinds of learning prepare adult learners to succeed in the higher education. RPL assessment is ‘an academic task’ (p.3), done by ‘academic experts’ (p.3) to ‘assess and recognise the achievement of knowledge and skill’ (p.8). There is little use of the ‘excellence’ discourse *per se*. There is much more discussion on how to get these students *in* (access) than on how to ensure they succeed, although there is a strong argument made in the policy that RPL can only be implemented *if there is sufficient learning support for students*. Furthermore, if UCT were to apply the principles of RPL as they are described in the policy, the text spells out that this would be a fairly direct challenge to the traditional practices of academic teaching and academic evaluation of success. For instance:

The relationship between academic curriculum and professional practice differs across programmes and disciplines, as does the mix of theoretical study, application, and interface with the broader society. RPL provides the occasion to interrogate curriculum, test epistemological and pedagogical assumptions, and recognise both the foundational principles and changing face of academic inquiry.

(...)

Academics will also take the lead in exploring the pedagogical and curricular possibilities opened by and through RPL, and in leading the epistemological debates that arise therefrom.

(Extract from Section B, 3.1 The Epistemological Challenge of RPL, p.7)

And,

RPL recognises that the relationship between academic knowledge and the knowledge created in other sites of practice changes with disciplinary context or field of study, and can be the subject of healthy contestation.

(Extract from Section B, 3.2 RPL and Curriculum Responsiveness, p.7)

One of the five purposes of RPL is even stated as being ‘to enrich the academy and the curriculum by facilitating dialogue across sites of knowledge and practice’ (p.3).

Strong elements of change and contestation can be found in those extracts, and this text, presented as a policy document, reads more like a discussion of possibilities. It provides individuals in the system with tools to challenge the more traditional academic practices.

5.3.2 Economic discourse

The discourse around meeting the need for a skilled workforce is found mainly in the background of this text. It features only explicitly in the preamble, where the national context is discussed. The National Plan for Higher Education is once again referenced where it is stressed that the recruitment of non-traditional students ‘would also play a significant role in addressing the shortage of high-level skills in the short to medium-term, especially as there is a large potential pool of recruits’ (p.1).

But the content of the RPL Policy document – about the recognition of other kinds and places of knowledge and learning – is a central element of workplace discourse. The need to continuously upgrade skills and acquire new knowledge at work, and continuing to learn while employed is a requirement of the modern worker (Gee *et al.*, 1996; Edwards, 1997; Castells, 2001a). Recognition of Prior Learning (and Continuing Education, for that matter) is an essential component of facilitating the connection between academic learning and workplace learning. Two of the purposes of RPL stated in the policy document allude to this.

- To enrich the academy and the curriculum by facilitating dialogue across sites of knowledge and practice.
- To promote and facilitate lifelong learning.

(Extract from Section 2. Purpose of RPL, p.3)

In the Appendix to the RPL policy, which outlines possible sites for implementing the policy, the practical application of RPL to the workplace is spelt out. It identifies many workplace situations or sectors where employed people, lacking skills, and without the necessary prerequisites for admission, could be recruited into higher education using RPL.

5.3.3 Social and social responsiveness discourse

In many ways, the issues of equity and redress, and social responsiveness are presented together in the RPL policy. Thus, in outlining the principles governing RPL, the document says: 'RPL is part of UCT's broader commitment to be socially responsive to key social needs, and to significant constituencies in government and civil society.' (p.3)

Probably the strongest element of discourse in this text focuses in particular on equity and redress. The policy purpose has five clauses, one of which is 'to facilitate access to higher education and provide redress for historical inequities' (p.2). The preamble quotes the National Plan for Higher Education (2001) which declares that higher education institutions should recruit non-traditional students, who are defined as mature learners, workers and the disabled, to provide equity and redress (see p.1). RPL is about people, who do not meet the normal entry requirements (which are based on academic school performance), gaining access to higher education. It then becomes the job of academics to establish whether a candidate's prior experience and knowledge will enable them to succeed in an academic environment.

This (RPL) includes knowledge gained as a result of non-formal study, paid and unpaid work experience, community and organisational involvement, and individual inquiry. In the academic context, it is the acknowledgement that academically significant and socially useful knowledge is acquired through multiple formal, informal, and non-formal means.

(Extract from Section 1: Definition; RPL policy, p.2)

As discussed in section 5.3.1, this recognition of 'other' knowledge and skills is difficult for the traditional academy to deal with, and challenges the University's role as the primary site for knowledge generation. But RPL not only offers a challenge about the type of knowledge that is accepted as 'academically significant', it also challenges the traditional view of *who* can succeed in higher education. Using RPL to facilitate access for people who have been denied opportunities by the past discriminatory practices brings in a range of learners who not only missed out on formal educational opportunities, but who may face other barriers to learning (such as a second language, few learning skills and less 'cultural capital' based on social class and other privilege (Bourdieu quoted in (Delanty, 2001:89) – this is the equity and redress function of RPL. The RPL policy sees itself as playing a socially responsive role, blending the tension of maintaining excellence and opening access in a way which uniquely reflects the broader context of contemporary South Africa.

RPL participates in the on-going interaction between the academy and civil society. It recognises that this interaction contributes both to the University's knowledge-creation role, as well as its role of service to the broader community. RPL is an aspect of UCT's commitment to equity and redress and reflects its openness to a range of different forms of pedagogy and assessment.

(Extract from Section B, 3.2 RPL and Curriculum Responsiveness, p.7)

The interaction between the context and social processes which give rise to the text production (as outlined by Fairclough's diagram of discourse in figure 3) are evident in this analysis.

5.4 In summary

This chapter set out to analyse the discourses of lifelong learning at UCT as represented in three selected documents. The documents allowed me to identify at least three discourses – which were academic, social responsiveness and a blended economic/humanistic discourse. Although all the documents were 'official' texts, these three documents represent different incarnations of UCT. In the Mission Statement, the presentation of the identity of the institution reveals multiple concerns which include all three of the discourses. The two policy documents analysed – the CE Policy and the RPL Policy – show different aspects of the institutional identity. The CE Policy is about monitoring and controlling a set of less formal practices at the institution. The academic discourse is most evident. The RPL policy is more developmental, creating spaces for new models of recognising knowledge and learning which may challenge some of the existing ideologies. In this text, the three discourses are all visible, but the social discourse is the dominant one.

Gee suggests that 'each Discourse contracts complex relations of complicity, tensions, and opposition with other Discourses' (Gee *et al.*, 1996:10). The interesting question is whether all these discourses together represent a permanent part of the 'institutional' discourse (the 'dissensus' – as described in (Delanty, 2001), or several different hostile discourses in active contestation where one will finally overpower the other? This question is picked up again in the final chapter.

The identification of discourses in some of the policy documents of UCT appears to support the assertion that the 'emergence of new kinds of discourse is not only a consequence of social change, but also an instrument of social change' (Cameron, 2001:130). There are some cases of aspirational discourse (e.g. in the RPL policy) – which demonstrate the way in which a discourse (in this case, strongly articulated ideas around redress, equity and access) can map out a practice for the institution *which is not yet fully in operation*. The RPL policy document is an 'instrument of social change' in that it can be used by agents within the institution who are working to realise those goals (equity, access or redress).

Referring back to Fairclough's discourse as represented in Figure 3 (page 33), the 'interaction' – the processes of producing policy texts and the interpretation of those texts by practitioners on the ground – is the fuel of social change. Policies are continuously being interpreted and disputed as people read and apply them. As the critical discourse analysts point out, the reading and interpreting is as much a social process as the writing of text. Thus, these printed words are not static texts, they are

changing and developing as they get read, interpreted, argued over, amended and re-negotiated.

At UCT it is possible to identify some strong discourses (for example: the discourse of the academy and the theme of excellence), but, it is also clear that there are competing discourses, both at the level of the 'official' text, and in the (hearts and) minds of the individuals who are enacting the institution on a day-to-day basis.

In the final chapter this analysis will be taken up to talk about how close the institutional representation is to the actual practices.

University of Cape Town

CHAPTER 6

6. CONCLUSION

In conclusion, how do the two sets of data help to answer the research questions: what are the different understandings of ‘lifelong learning’ at UCT? And, what factors have shaped the development of these different understandings of ‘lifelong learning’?

6.1 Different understandings of lifelong learning at UCT

Given the difficulties outlined at the outset in even defining the term, lifelong learning, the thesis approached the research questions by capturing perspectives, and trying to trace the influences on these perspectives. Two angles were engaged: what people working in the Institution said about the topic and what could be read from the official university documentation on the topic.

In preparing for the interviews, the literature revealed some common discourses about lifelong learning, namely economic, humanistic and social. I used these three discourses when considering both the interview material and the institutional texts.

6.1.1 What the analysis of the data revealed about the discourses

I looked for and could find the three discourses in both the interviews and the texts. But in neither of the data sets could they be isolated or ‘boxed’ as I had represented them in my simple model (figure 2). Table 2 on the next page summarises my analysis of where these discourses were evident. For analytical purposes, I had made separate categories for the three common discourses of lifelong learning contained in the literature reviewed (column one in Table 2). When it came to real people (see column two) and the actual texts (see column three), these clear divisions at some points merged and collapsed into one another, additional categories arose or new ones grew out of the merging (column four). The dotted lines represent the blurring of the categories.

Table 2: Analysis of results by different discourses

One	Two	Three	Four
LITERATURE REVIEW (Chapter One)	PRACTITIONER INTERVIEWS (Chapter Four)	OFFICIAL INSTITUTIONAL DOCUMENTS (Chapter Five)	NEW OR EMERGING DISCOURSES (Chapter Six)
ECONOMIC	ECONOMIC	ECONOMIC/ HUMANISTIC	MODERN WORLD
HUMANISTIC or personal growth	HUMANISTIC or personal growth		
SOCIAL	SOCIAL	SOCIAL SOCIAL RESPONSIVENESS	SOCIAL RESPONSIVENESS
	ACADEMIC	ACADEMIC	ACADEMIC

6.1.1.1 Multiple, blended discourses

The most important finding from the analysis of both sets of data was that the simple schematic representation of the discourses of lifelong learning did not hold up when applied to real situations. The categories tended to merge or blend in several different ways, and this was most notable with the economic and humanistic discourses. The extent of the blending of these two categories I argue suggests a new discourse – education for living in the modern world – which is discussed in the next section.

The humanistic or personal growth discourse was often difficult to isolate in the practitioner interviews and the institutional texts. But this does not mean that it was absent. There was a strong element of the personal growth discourse in some of the data (for example: Interview 8, Summer School) but the re-interpretation of personal growth as a career-orientated self-improvement motivation was pervasive (see for example, Interview 1, MBA; Interview 2, Diploma in Education; Interview 5, Clinicians Educator short course; Interview 10, Third Term as well as in the Mission Statement). In the data, the personal growth discourse was often tightly woven in with economic concerns – education for the workplace, acquiring the knowledge, skills and aptitudes to become the ideal worker of the future (Castells, 2001a). Some categories begin to collapse (represented by the dotted or absent line between rows in the table above), as individual's motivations cannot be neatly categorised as either learning for work or learning for personal development.

Aside from blending and blurring, a discourse that I had not considered was evident (the academic), and two new, or at least emerging, discourses ('modern world' and 'social responsiveness') could be identified arising from the data analysis.

6.1.1.2 New or emerging discourses

In column four of Table 2 on page 76, three discourses are presented which are different from those with which I began (column one in Table 2).

- *Academic discourse*

An additional discourse was detected in both the official institutional texts and the practitioner interviews – concerned with the academic nature of education (added as the bottom row of Table 2). This emphasis is not surprising since universities have created a strong academic identity constructed out of their own particular site of practice which includes a recognised discourse of its own.

In the interviews, some informants raised questions about applied, practical or work-orientated learning which was seen as different to traditional academic learning (see for example, Interview 6, Modules in a Masters Programme and Interview 1, MBA). However, these two informants raised these concerns from quite different angles. The first of the two informants referred to above, set up a dichotomy between continuing education and short courses as meeting adults' needs for 'functional knowledge or immediate sets of skills' on the one side and full academic study which would develop a wider range of knowledge on the other. The latter informant was interested in getting traditional academics to embrace more applied, practical learning opportunities for learners studying for full degrees. Quality of learning in short courses was another theme which was expressed as a concern by the practitioners.

The academic discourse was also fairly prominent in the institutional texts – for example, underlying ideas about 'excellence' (Mission Statement, the CE Policy), the unique nature of academic learning (RPL policy), concern about standards and quality (CE Policy), and an emphasis on research (in Mission Statement). Even though the interpretation of how academic discourse should be understood was contested, I decided that the 'academic discourse' was prominent enough in the data for me to include it as one of the new discourses revealed by the research, since some practitioners and policies took into account academic 'criteria' when considering lifelong learning at university .

- *'Living in the modern world' discourse*

Some writings on lifelong learning raise alarm at the blending of the personal into the economic motivations (for example Martin, 2003; Edwards *et al.*, 2001; Crowther, 2004), expressing concern that the values of individual human development and social upliftment which have been foundation

stones of adult education in the past are being overridden. The data from this study can be interpreted in other ways. It is possible rather to see a new discourse being created – I have called it a discourse of education for ‘living in the modern world’ captured in the UCT Mission Statement as ‘Educating for life’. Instead of looking for a fit or a deficit with old categories, it may be possible to see the changing environment as throwing up struggles or contestations over defining new discourses. Other commentators, for example, Walters (2006), suggest that the proliferation of the discourses of lifelong learning offer unique opportunities for expanding access to learning by people who have been excluded in the past. By emphasising the economic value of all education, there are more opportunities to lever resources into the traditionally neglected field of adult education (Walters, 2006: 12). But this does not mean that the humanistic and social values of education need to be left out.

- *Social responsiveness discourse*

In the analysis of both data sets, the social purpose of education featured firmly on the agenda. In neither data set was the social discourse the strongest or most pressing, but the theme of education’s engagement with the community (in various manifestations) was established as an assumed role. In the official university texts, the social discourse altered into a broader ‘social responsiveness’ category, which is itself an elastic concept. In some ways, this epitomises the blending of the discourses since the term ‘responsiveness’ includes responding to political agendas (for example, the Mission Statement, RPL policy), to economic determinants (for example, the Mission Statement) as well as to moral ideals of realising human potential and ending oppression (see RPL policy and the Mission Statement). Broadening the definition of the social discourse (with its strong themes of social justice and democracy – see Martin, 2003) to social responsiveness (which has a wider, less radical interpretation) allows an easier match with the Institution’s variegated identity. In the data it is possible to see how the interpretation of the university’s social role is contested, for example, in the debates about access to higher education (e.g. Interview 1, MBA; Interview 10, Third Term); equity questions (e.g. the RPL policy) and how exactly does ‘the University’ engage ‘the community’ (for example, Interview 2, Diploma in Education; Interview 5, Clinician Educators’ short course; Interview 8, Summer School and the Mission Statement).

6.1.1.3 Ongoing challenges for Higher Education

The analysis surfaces many of the pressures and challenges with which higher education, as a sector, is grappling. One interpretation of the data is that UCT’s institutional perspective on lifelong learning is a superficial acknowledgement that people need to refresh their knowledge more often because of the changing pace of the modern working environment (the Mission Statement). Thus, a parallel set of continuing education opportunities need to be provided to deliver efficient, high quality, skills-focused, professional development courses which capture much needed extra income to support the core business of undergraduate education and building the research capacity of the university

(CE Policy). As shown in Chapter Four, the faculty short courses units and the Centre for Open Learning set up with a central income generating purpose would fit into that perspective.

Another reading of the data is that the university as an institution is promoting the value of academic learning (which is about developing deep understanding and critical perspectives) while also shifting its practices to include a recognition that education needs to be socially responsive, applied to the challenges of modern living, flexible and continuing throughout a person's life (the Mission Statement, the RPL Policy). The analysis of the practitioner interviews and the documents shows how these various dimensions of educational practice are struggling to find accommodation at UCT. The RPL policy gives an indication how new spaces are being created to incorporate learners and types of learning that have not traditionally been part of UCT's target for student recruitment. The interview with the practitioner working on the MBA provided one example of the way in which the curriculum is being expanded to include more applied, work-based and socially responsive methods of learning and assessment.

As was noted in Chapter Five, the emerging discourses themselves can help to create new realities. Instead of seeing the data as only revealing what exists, the analysis also showed processes which are attempting to create what the social discourse describes.

6.1.2 Lifelong learning at UCT – answering the first research question

There are many different perspectives – shown through the interviews with practitioners as well as the different emphasises in the official texts – although there is only one institution. It may be more accurate to represent multiple, co-existing discourses, some of which are creating new realities (Mesthrie *et al.*, 2000).

Indeed, the critical element in the structure and dynamics of university systems is their ability to combine and make compatible seemingly contradictory functions (Castells, 2001b:211).

Castells' description of the university resonates with Delanty's argument that the university be seen as 'a community of dissensus' (2001). The data has revealed 'dissensus' and this provides a key finding. While acknowledging the different context and time in which he was writing, Readings (1996:21–31) concern about the changing institutional form of the university is focused on the way in which corporate interpretations of education (seen as a product needing quality management) are coming to dominate the discourse of education. He draws attention to the danger that these 'corporate' approaches are pushing aside more liberal notions about the social purposes of education (also discussed in section 1.4.1). The analysis of my data showed evidence of all the various discourses

identified (economic, social, humanist and academic), but it also showed how the discourses were blending in their articulation by the practitioners and in the texts. This does not *have* to be problem (as argued by Walters, 2006). But it does pose a risk. There are enormously powerful forces operating around economic imperatives – global competition for trade pressurising the local economy, pressure to evaluate university performance on the same bases as a business as well as domestic financial pressures for education to make money for the institution (see sections 1.4.1; 1.4.2 and 2.5).

The other educational purposes – to contribute to social development, to the culture of human rights and democracy and to individual self-fulfillment – are moral and political agendas which may struggle to maintain their ground. Giving meaning to the way in which the university interprets lifelong learning is partly up to the practitioners engaging with the institutional spaces which have been created (for example, the RPL policy, the Mission Statement) and social opportunities (for example, the local socio-political pressures for transformation). As the data revealed, there are many factors influencing what choices get made on the ground in the delivery of educational programmes. I argue that the ‘dissensus’ which has been identified at UCT is a strength because it allows the discourses of development, democracy, personal growth and human rights to be championed *alongside* the more mainstream economic discourse. The nature of the institution tolerates different perspectives (as is captured by the multiple perspectives in both the texts and from the practitioners), and this allows for the continued expression of conflicting discourses within the same institutional frame – even though some (such as social discourse elements focused on adult access to higher education) may be relegated to the margins.

6.2 What factors have shaped the development of these different understandings of ‘lifelong learning’?

The answer to the second research question, ‘what factors have shaped the development of these different understanding of lifelong learning?’ is even harder to conclude neatly. Contextual factors were discussed broadly in Chapter One (drawing on the literature about Higher Education) and in Chapter Four (where practitioners were asked to identify particular influences). I selected three key factors influencing the understandings of lifelong learning: the changing social and political context in South Africa, UCT’s particular institutional character and concerns about sources of funding for higher education.

6.2.1 Factors in context

In considering how to interpret these factors more broadly, I found it helpful to refer back to the Fairclough model (figure 3), and discuss the factors shaping the discourses in relation to the *social*

context. The particular institutional character of UCT was discussed as a local contextual issue, the effects of the socio-political environment are most clearly acting out at a national level, while funding pressures are being experienced by higher education institutions globally.

On a *local scale*, UCT's particular institutional character can make the work around lifelong learning challenging. UCT has strong claims to be one of the most prestigious academic institutions in South Africa, a status which it is striving to maintain in the changing context of local and global tertiary realignment. This status of academic excellence can assist the institution to position itself better in the increasingly competitive market for learners (and therefore income). The foregrounding of the theme of excellence to develop a competitive edge carries with it greater need for central control over the quality of offerings. This may in part explain the very controlling emphasis of the CE Policy document. Some of the strengths of the institution – established, stable, well-resourced – can also be experienced as constraints. It is not always responsive, flexible and able to adapt easily to changing demands. Some see this as a positive feature (see Interview 6, Modules in a Masters Programme) while others see it as a barrier (see Interview 10, Third Term) to UCT becoming an effective institution for lifelong learning.

Nationally, there has been a total transformation of the political landscape, including education. New educational policies have put questions about lifelong learning more firmly onto the university's agenda – issues about access by non-traditional learners (including adult learners), flexible delivery (after-hours, part-time, mixed mode) as well as demands for greater output of graduates. The university is being challenged to be both more socially responsive and to provide highly skilled graduates for the economy (Hall, 2003). Many of the practitioners' interviewed articulate uncertainty about how these multiple pressures can be successfully managed by the university (See Chapter Four). The Centre for Open Learning's creation (as a vehicle for dealing with many of these challenges) can be seen in no small way as a response to this particular social context.

Universities *globally* are facing problems in finding sufficient funding and must now compete for the best students across international boundaries. This manifests itself in a variety of ways and brings to bear direct and indirect pressures on the institution and its member parts. Units for continuing professional development are founded because they are seen as 'a third income stream' for the university. Part-time learners and mature-age people become unattractive prospective students because of their slow rate of completion (Duke, 2005: 15) (and therefore delayed fee subsidy earners for the institution). Lucrative earnings from research encourage universities to prioritise post-graduate enrollments rather than paying attention to entry level access routes .

As a higher education provider which is subject to a variety of pressures (funding squeezes due to decreasing government support, problems with student 'throughput', global competition, the need to

distinguish itself from other local HEIs), UCT has defined its priority as ‘to promote academic excellence and the attainment of the institutional goal of becoming a world-class African University’ (UCT, 2001). While neither of these priorities explicitly excludes continuing education or increasing access to adult students, neither does expanding continuing education or increasing adult student enrollments *directly* promote the core goals of the University.

6.2.2 Shaping and changing the institution

UCT offers an interesting case study of an institution with many demands from external stakeholders (government, the private sector) and an active set of competing internal discourses. Having looked at discourses from two sets of data (the ‘official’ and the ‘practitioners’), the contextual factors clearly play a very significant role in shaping and changing the way that the discourses are created and interpreted. Two of the policy documents considered in the analysis (the RPL policy and the CE policy) specifically mention various external drivers having given rise to their creation. Interestingly, the same context gave rise to documents with very different emphases – one regulatory, emphasising more academic concerns, the other developmental, emphasising social responsiveness concerns. But while the texts can attempt to ‘create on paper a version (of what) their authors are trying to enact on the world’ (Gee *et al.*, 1996:240), it is only the agents (such as the practitioners) who can actually make it real. The institution is in a constant process of being shaped by many external forces and changed by agents engaging in creating new social practices.

For contextual insight, four years ago one of UCT’s Deputy Vice-Chancellors, Martin Hall offered the following summary of the challenges which South African universities should be addressing.

In a country such as South Africa, with an urgent need for accelerated social and economic development, for cultural resources that build the quality of life, for critical public discourse that strengthens democracy, and for the high level technical and professional skills development that will make the country more competitive in regional and international markets, overall increases in the places available to learners of all ages and backgrounds in higher education institutions, as well as increases in the diversity of these institutions themselves, will be both of individual benefit and to common advantage (Hall, 2003: 2–3).

That description of the South African context certainly captures a multiplicity of discourses and to meet those challenges, I would argue that universities should be embracing the broadest definitions of education – lifelong learning as it has been discussed in this thesis.

This research has shown how lifelong learning is given meaning in the way it is spoken and written about. It is not a single notion, and it is not static. What is documented by this research represents a glimpse of a social practice which will continue shifting as the context changes. In the final section, I briefly suggest some additional areas of research on this topic which could be productively pursued.

6.3 Further research

It is not unusual for a research process to uncover more questions than reveal answers and this research is no exception. Interesting and unanswered questions which could be researched further include:

- Perspectives from the learners – how do they see learning, work and lifelong learning? What factors and motivations have encouraged or discouraged them to keep learning?
- Perspectives from institutional leaders and administrators – what was going on in their minds (the ‘mental struggles’ referred to by Ivanič (1997)) when policies about lifelong learning were being written? What processes of production went on in the institution which produced these texts? What were the major factors of influence?
- What institutional factors are enabling or creating barriers to UCT becoming an institution which encourages lifelong learning?
- To what extent are there specific discourses linked to different academic disciplines (Becher & Trowler, 2001), and how do these relate to the overall institutional identity?
- How is the ‘academic discourse’ and practice changing in South African universities given the multiple challenges which are being faced?
- How is the identity of the University being redefined by the diversification of the learners, the incorporation of learning in other settings (e.g. applied, work-based) and duration of learning (modular, distance, short courses)?

This thesis has argued that multiple discourses can be considered part of an institutional identity – a ‘community of dissensus’ – if this state is seen as a positive response to a dynamic context.

As expressed by Cameron (2001) new discourses emerge in response to social change, but also act as instruments of social change. The multiple discourses around lifelong learning at UCT arise out of South African realities, but hopefully, they are also acting to change education practice at UCT to better deal with the broader challenges and needs of our society.

ADDENDA

A: PILOT SURVEY QUESTIONNAIRE

MINI QUESTIONNAIRE ON LIFE LONG LEARNING

1. Can you give examples of work currently being done in your particular field at UCT (whether this be at the level of a faculty, department or unit) which, in your view, represents lifelong learning:

2. Do the initiatives you have described in question 1 match, in broad terms, any of the commonly perceived purposes of lifelong learning that I have listed below?

 For economic progress and development

 For personal growth and fulfillment

 For social inclusiveness and building a democratic society

 (Other)

3. Keeping in mind UCT's history and mission, and the recent launch of the Centre for Open Learning, how do you think *the purpose of lifelong learning* should be conceptualised at UCT in the future? Please choose any or some of the purposes listed below which most closely fit your view. (If none fit, please indicate and you could elaborate in a follow-up interview).

Tick as many of the options as you like.

-
- opening access to high quality continuous learning opportunities to as many people as possible
-
-
-
- producing graduates with the flexibility and sophistication to allow them to hold their own in the ever-changing economic environment both locally and globally
-
-
-
- making UCT programmes more flexible and portable (things like credit accumulation, more part time, block release and distance education components) so

that adult learners' work and life constraints don't prevent them gaining tertiary education

ensuring that UCT widens access to those previously disadvantaged by providing a variety of entry and qualifying criteria, and ongoing support in learning programmes

ensuring that the educational experience and learning content contribute to the development of an equitable, just and humane South African society

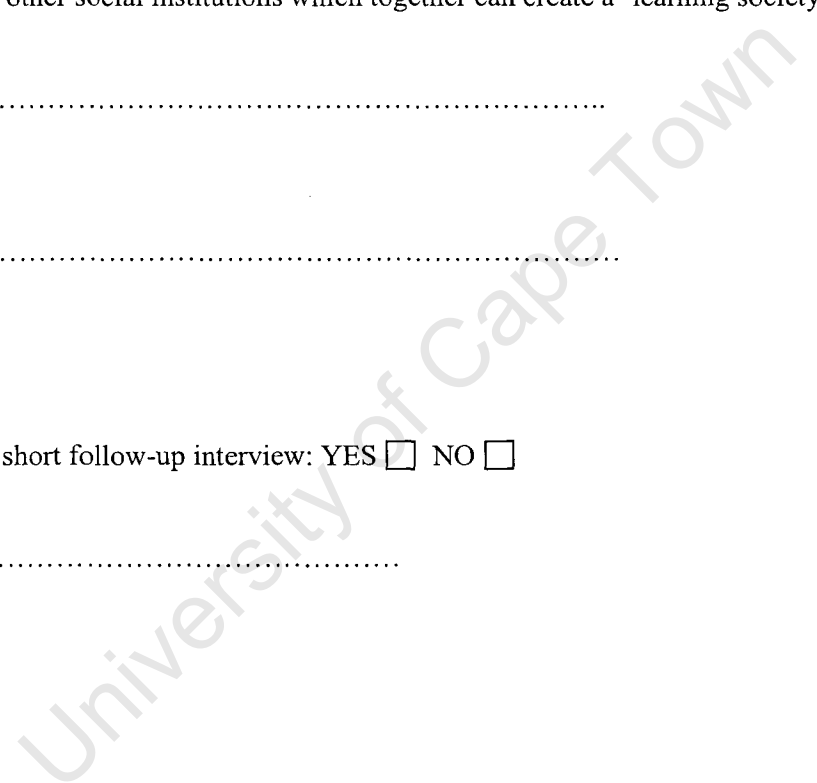
building greater links between schooling, higher education, workplace learning and other social institutions which together can create a 'learning society'

.....

.....

I am available for a short follow-up interview: YES NO

NAME:



B: LIST OF INTERVIEWS**Table 3: Interviews conducted**

#	FACULTY	INFORMANT	TYPE OF COURSE	TARGET LEARNERS
1	Commerce	Senior staff member on MBA programme, Graduate School of Business 02/12/05	MBA and Associate in Management (AIM) programmes <ul style="list-style-type: none"> • Two-year part-time or modular/block release UCT credit-bearing courses • Work experience essential • Post graduate for MBA • RPL practiced in both programmes but MBA applies standard tests 	Middle-level managers – Post-graduate general management education to develop leadership skills of business people
2	Humanities	Lecturer in Adult Education 05/12/05	Diploma in Education (adult education) part-time programme <ul style="list-style-type: none"> • Two-year part-time • Work experience essential • Admission by RPL 	Professional development for working trainers/educators and access to higher education for working ETD practitioners
3	Engineering and Built Environment	Two staff members from Continuing Professional Development Unit 03/03/06	Project management short course <ul style="list-style-type: none"> • 12-week short course • Two cohorts in class – full-time registered UCT engineering masters students and members of the general public 	Engineers to keep up to date with the latest theories and developments in the industry

			<ul style="list-style-type: none"> For those not enrolled for masters, no entry requirements, but an exam may be written to earn a departmental certificate of completion 	
4	Commerce	Senior staff member, Executive Education, Graduate School of Business 14/03/06	<p>Short courses for managers</p> <ul style="list-style-type: none"> range in length from two days to two weeks non-credit bearing no entry requirements 	Professional development for managers – upgrading skills for contemporary challenges
5	Health	Staff development practitioner, Education Development Unit 31/03/06	<p>Clinician Educators course</p> <ul style="list-style-type: none"> 12-week course Must be practicing medical professional No credit given 	Medical practitioners who needed new teaching skills to deal with the new curriculum
6	Commerce	Senior lecturer, Management Studies 03/04/06	<p>Modular masters programme</p> <ul style="list-style-type: none"> Graduates who have not meet the Masters entry requirements are allowed to join some semester long modules as occasional students Leave with a departmental certificate Are developing short courses without any 	Business professionals who need a particular skill to compete better in the market

			entry requirements	
7	Science	Course co-ordinator, self-funding consulting Unit, Environmental and Geographical Sciences, 21/06/06	Integrated Environmental Management. <ul style="list-style-type: none"> • Two-week short course • No entry requirements • Certificate of completion 	Mid-career professionals who needed a crash course in environmental management skills
8	Centre for Higher Education Development	Three senior staff members, Centre for Extra-Mural Studies 03/07/06	Summer School public education programme <ul style="list-style-type: none"> • Two-week programme of lectures and lecture series • no entry requirements and no certification 	The general public – making the intellectual resources of the University more widely accessible
9	Law	Senior staff member of the continuing professional development programme 24/08/06	Legal education short courses <ul style="list-style-type: none"> • range in length from a few days to a few months • courses aimed at the general public and some more directed at legal professionals who need to update their skills • some courses have departmental certification which means people have to take some kind of evaluation • most courses have no entry requirements, some require work experience in a 	People working in the legal profession who need to sharpen their skills or people in business who don't have a legal degree but need to deal with legal issues

			particular field (e.g. compliance management)	
10	Centre for Higher Education Development	Senior staff member, Third Term Division, 31/08/06	Third term courses <ul style="list-style-type: none"> • one month, intensive courses which offered a compressed version of a full semester UCT crediting-bearing course • must be a currently UCT student • must have completed at least one year of university 	Currently registered students at UCT (and other tertiary institutions of the western Cape)
	Humanities	Background interview done with acting deputy dean to identify possible programmes 02/07/06		

C: INTERVIEW SCHEDULE ON LIFELONG LEARNING

1) PROGRAMMES OR PRACTICES:

Description

- Identify what component of their work we can discuss as an example of lifelong learning (it may be an approach to conventional teaching or it can be a special or new programme)
- Describe how this programme or practice emerged – concentrating if possible on its rationale/how it developed
- Get details
 - content/nature of programme;
 - target group/or type of learners;
 - length of programme's existence;
 - special features of the programme;
 - what makes it an example of LLL;
 - how did it emerge and how has it changed;
 - what have you observed about this programme.

2) YOUR INVOLVEMENT

Influences on person – institutional, exogenous and endogenous

- How did you become involved in this programme/practice?
- What factors influenced your thinking? (exogenous & endogenous)
- What do you think about the future of this programmes/similar programmes?
- How is UCT's history and location affecting your programme?

3) CHALLENGES, DEVELOPMENTS, BREAKTHROUGH

Pressures & drivers endogenous & exogenous

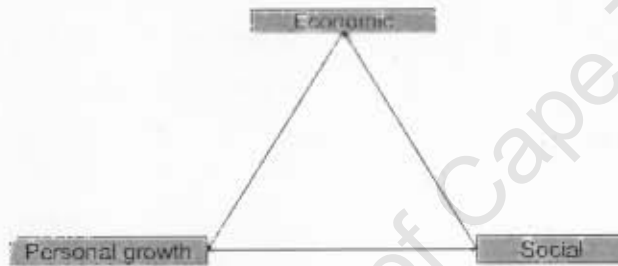
- Can you describe what you see as the major challenges your programme/practice has been faced with or is facing?
- What have been significant factors influencing the development/direction of your programme/practices?
- What do you perceive to have been drivers in the development/emergence of this kind of programme/practice?

4) THE TRIANGLE OF PURPOSE (see below)

Purpose (against diagram)

- Show the triangle of purpose and ask them to comment on whether their programme/practice/approach could be plotted on this.
- Where, why do they see it like that?
- Thinking about the HE terrain and UCT's particular history and current location, how do you see the purposes of LLL at this institution
- Open it up – on future vision looking for ideas on direction.

Lifelong learning -- dimensions of purpose



D: TYPES OF COURSES

In Addendum B, all the interviews are listed according to faculty and type of course. In order to make it easier for the reader to locate the courses selected, I have devised a categorisation of four broad 'forms' or 'types' of learning available at UCT if someone is not enrolling as a full-time student for a degree.

Part-time study towards a full qualification

In 2006, there were only six programmes²¹ specifically named 'part-time' offered at UCT. However, many more programmes have modes of delivery which make it possible for working people to study part-time towards a full qualification, even though students are not registered with a 'part-time' status. For example, several of the streams of the Diploma in Education, Advanced Certificates in Education and various Honours and Masters programmes offer classes in the late afternoon so as to accommodate working people²². I conducted two interviews in this category.

Single credit bearing course

There are two ways it is possible to register for a single UCT credit-bearing course. The Third Term programme in the Centre for Open Learning is designed to allow currently registered UCT students to gain credits for intensive versions of some mainstream courses taught during the summer and winter vacation.

In addition, it is possible to enroll as an 'occasional' student for a single course – but this does not count as a credit towards a degree. None of the programmes I focused on dealt with admissions in this way. I conducted one interview in this category – from the Third Term Programme.

Short courses - work-related with or without certificates

This is a very broad category incorporating a wide range of types of learning – the common denominators being that these courses define themselves as being 'short courses' (not part of any formal degree programme), and that they are generally orientated to work, skills or professional development. In most cases, there is no grading even though students may be expected to engage

²¹ The programmes listed as formal part-time programmes at UCT in 2006: the Associate in Management programme; Post-graduate Diploma in Accounting; Post-graduate Diploma in Management Practice; B.Com (Hons) in Financial Management; B.Com (Hons) in Information Systems; Part-time MBA. Internal UCT data sources, October 2006.

²² Source – teaching staff of the Higher and Adult Education Studies Development Unit (HEASTDU) in Centre for Higher Education Development (CHED).

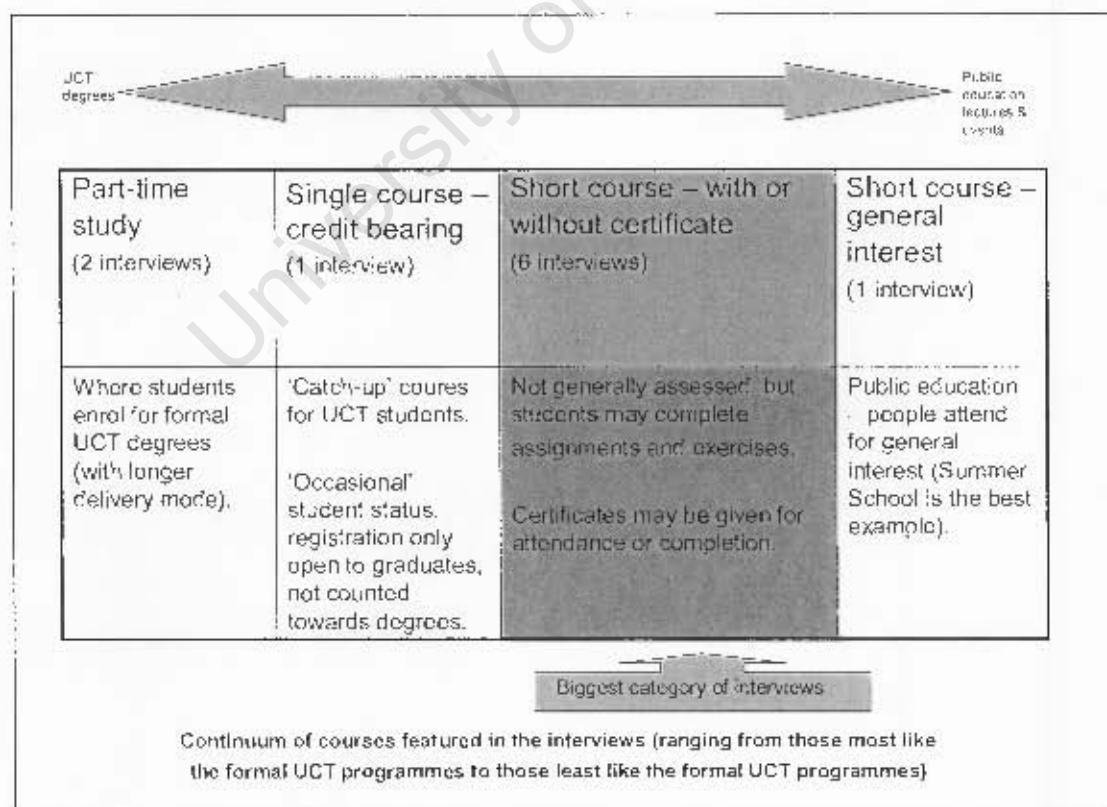
in course work or assignments, or if grading is done, the course is not formally linked to progression in any existing UCT course or degree. This is the biggest category of courses discussed in the interviews²³, across the widest range of the faculties. I conducted six interviews in this category.

Short courses for general interest

The public education programme, the annual UCT Summer School, would be the best example where this type of course occurs. People who attend courses in this category receive no formal record of their attendance at all. I only conducted one interview in this category – with three Summer School lecturers.

To provide an understanding of the kind of courses I am describing in relation to the usual university courses, I have plotted the categories on a continuum of very formal to least formal (in relation to UCT's recognised mainstream programmes) in Figure 5 below.

Figure 5: Continuum of type of courses featured in interviews



²³ My research methods specifically focused on short courses in the selection procedure for the faculty survey.

The interviews I conducted made it possible to gather data about at least one programme or a single course in each faculty. There may have been several other courses in a particular faculty which could have been chosen, but based on the definitions I had created, I tried to select one which showed clear evidence of lifelong learning. In two faculties – Commerce and CHED – more than one interview was conducted. Three interviews were conducted in the Commerce Faculty because the Graduate School of Business (GSB – which is part of the Commerce Faculty) is administered somewhat separately and is physically located on its own satellite campus a few kilometers from the main campus. The GSB is geared to offer professional development or post-graduate studies to qualified working people who want to further their careers in the business sector, while the rest of the Commerce Faculty is an integral part of the UCT main campus and caters as much for foundation level studies and undergraduate as for post-graduate students. Two interviews were done within CHED (which comprises the 7th UCT faculty having a dedicated support rather than disciplinary-based role) because two unique and relevant programmes are located there: the Third Term programme (offering stand-alone UCT credit-bearing courses) and Extra-Mural Studies (which runs the Summer School public education programme).

E: DESCRIPTIONS OF THE PROGRAMMES

The background descriptions about the programme where practitioners I interviewed were located are composed of material collected in the interviews (in response to the first interview questions which asked people to describe their programme) and from public material found on the faculty or unit Websites.

The courses are listed in the order in which I conducted the interviews and, for easier reference, they are also identified by number (listed in brackets).

Masters of Business Administration, Graduate School of Business, Commerce Faculty (Interview 1)

Faculty	Department	Programme/Course	Type of course	Number of interviewees
Commerce	Graduate School of Business	Master of Business Administration (MBA)	Part-time study towards a full qualification	1 programme convener

Although it is formally part of the Commerce Faculty (see information about the Commerce Faculty in section 4.1.6), as noted early, the Graduate School of Business (GSB) has a distinct identity and brand for its marketing.

The Masters of Business Administration (MBA) is considered the 'flagship programme of the Graduate School of Business' (Interview 1, MBA, Commerce). The MBA programme is characterised by a demanding curriculum. It is traditionally offered as a very intensive, full-time one year programme and designed to 'develop students both personally and professionally'²⁴.

When it began, the MBA was based on the American model, which is a post-graduate degree aimed at commerce students who wished to study further. Since the 1980s, the UCT MBA programme has moved towards a more professional development model. The MBA requires applicants to have at least three years work experience, they must take entrance tests, they should be degreed (although 10% of candidates are allowed in via RPL) and they have to go through a rigorous interview process.

²⁴ www.gsb.uct.ac.za

The modular (and part-time) MBA is aimed at people who continue to work while studying for the MBA. The modular MBA is run over two years, rather than one year full-time, and it is this that was the focus of the interview.

Diploma in Education, Humanities Faculty (Interview 2)

Faculty	Department	Programme/Course	Type of course	Number of interviewees
Humanities	Education	Diploma in Education (Adult Education)	Part-time study towards a full qualification	1 lecturer

The Faculty of Humanities is one of the most diverse faculties at the University. Its research units span the Performing and Creative Arts, and Social Sciences, as well as Education²⁵. Although the School of Education focuses mainly on post-graduate qualifications, the Diploma in Education (Adult Education) provides a programme of initial professional education for practitioners who have work experience in the field of adult education and training. It is an entry-level course and targets students who have work experience, allowing many to enter through a RPL process rather than having formal matriculation results.

This diploma developed out of the formalisation of one-year non-accredited courses through the then Department of Adult Education and Extra-Mural Studies (which no longer exists in that form). The non-formal, year-long programme had emerged out a range of short courses established in the 1980s and aimed at providing the opportunity for community workers to have a chance to reflect upon their practice in the context of the struggle against apartheid. This was seen as a particular role for UCT at that time (Interview 2, Diploma in Education, Humanities).

Continuing Professional Development, Engineering & Built Environment Faculty (Interview 3)

Faculty	Department	Programme/Course	Type of course	Number of interviewees
Engineering and Built Environment	Continuing Professional Development Unit	Short courses for professionals	Short courses - with or without certificates of attendance	2 programme conveners

²⁵ www.uct.ac.za/faculties/humanities

The Engineering & Built Environment (EBE) Faculty Website promotes its research-based teaching methodology, which it argues, has allowed the Faculty to build a strong partnership with private enterprise and government agencies through research projects conducted under its auspices.

The Continuing Professional Development (CPD) Programme is affiliated to the EBE Faculty. The unit organises short courses, workshops and conferences, which provide a means for the ongoing education of professionals and technical staff, outside of the formal academic courses offered at UCT for degree purposes. Initially called the Continuing Engineering Education Programme when it began ten years ago, it offered short courses which allowed engineers to be kept up to date with the latest theories and developments in the industry - through, for example the 12-week Project Management course (which still runs successfully today).

Although many of the courses are specifically designed for working professionals in engineering related fields, the courses are also open to the general public. Generally the courses have no formal entrance requirements, although in some cases, prerequisite specialised knowledge may be required. In agreement with the Engineering Council of South Africa (ECSA), courses can be used by South African registered professionals to claim CPD points which are required for the renewal of their professional registration²⁶.

Executive Education, Graduate School of Business, Commerce Faculty (Interview 4)

Faculty	Department	Programme/Course	Type of course	Number of interviewees
Commerce	Graduate School of Business	Executive Education courses	Short courses – with or without certificates of attendance	1 programme convener

In parallel to the formal degree programmes, the Graduate School of Business also has an Executive Education Unit. This unit offers short courses aimed at supporting executives and managers. The courses draw significantly on the philosophy and methodology of the GSB's Executive MBA programme, and the objective of the unit is to offer graduates of the GSB (and other business people) continuing professional development opportunities. The approach is to

²⁶ www.cpd.uct.ac.za

offer new, 'cutting edge' knowledge and skills development to keep the business leaders up-to-date with new developments. The courses cater for various levels from emerging leaders to experienced executives, as well as on areas of specialist interest.

The Executive Education unit's purpose is to generate surplus income which can be used by the GSB for other projects and programmes (Interview 4, Executive Education, Commerce).

Clinician Educators' short course, Health Sciences Faculty (Interview 5)

Faculty	Department	Programme Course	Type of course	Number of interviewees
Health Sciences	Education Development Unit	Short course for GPs	Short courses – with or without certificates of attendance	1 lecturer

The Faculty of Health Sciences at UCT has the oldest medical school in Southern Africa. Its core business is research in medical and allied fields, as well as teaching undergraduate and postgraduate students over a wide range of healthcare-related disciplines.

The course which was the focus of the interview is entitled *Teaching, Learning and Assessment for Clinician Educators* and was offered through a collaboration between the EDU and the Higher and Adult Education Studies and Development Unit in CHED. It is a non-credit bearing, professional development course aimed at clinical teaching staff. It is offered over 18 weeks.

The newly-devised course was run as a pilot course for family practitioners who teach in the Department of Family Medicine but also have their own General (medical) Practices. 'The reason why we started this course is that there was a request that they are (being expected to) do all this (teaching) and it is different to the way they were taught' (Interview 5, Clinician Educators' short course). These medical practitioners were never given any training as teachers, and in addition, they have no experience of using the new methodologies which are now part of the Health Science curriculum²⁷. The course is specifically designed to take into account the context of

²⁷ For example, problem-based learning or teaching in small groups with integrated assessments.

clinical educators, and aims to provide them with the opportunity to develop and improve their understanding of, and practical skills in teaching, learning and assessment²⁸.

Modules in a Masters Programme, Commerce Faculty (Interview 6)

Faculty	Department	Programme/Course	Type of course	Number of interviewees
Commerce	Management Studies	Modules in a Masters programme	Short courses – with or without certificates of attendance	1 senior lecturer

The Commerce Faculty is the largest of all the faculties at UCT and its programmes are aimed at preparing graduates for participation in the global economy. At the postgraduate level the faculty offers a wide range of qualifications, including vocationally and professionally-focused postgraduate diplomas, full-time and part-time Honours degrees, and Masters and Doctorates.²⁹

The School of Management comprises several sections that teach and research in the key management disciplines and Actuarial Science.

One of the Masters programmes in the School of Management is offered via classes scheduled in the evenings, two days per week. All learning activities are arranged to suit people who are fully employed. In order to qualify for selection into the programme, people usually need to have an Honours degree. At the time of the interview, people who didn't qualify for the Masters degree could sign up for individual modules and do these as short courses, with certificates of completion issued by the Department. This arrangement was the focus of the interview. Since this interview was conducted, the department has decided that incorporating occasional students into an existing year-long class programme is disruptive. Those people wishing to study the topic who are not selected for the Masters Programme are now directed to a special short course certificate programme which has recently been established.

²⁸ www.uct.ac.za/faculties/healthsciences/

²⁹ www.uct.ac.za/faculties/commerce/

Environmental short course, Science Faculty (Interview 7)

Faculty	Department	Programme /Course	Type of course	Number of interviewees
Science	A self-funding consulting unit within the Environmental and Geographical Sciences	Two-week residential course on environmental management	Short courses – with or without certificates of attendance	1 course convener

The Faculty of Science at UCT considers itself, by various measures, the best in the country. It claims that as a faculty, it has the largest number of scientists who have been rated through a process of international evaluation and who are acknowledged to be world leaders in their fields³⁰. The Faculty offers a suite of undergraduate and postgraduate programmes.

The Unit in which the interview took place is an independent, self-funded research-consulting- and training-unit based in the Department of Environmental and Geographical Sciences. Founded in 1985, the Unit is well-known in the fields of integrated environmental management and sustainable development. It has done consulting work in South Africa and southern Africa, as well as participated in global research and policy initiatives.

The Unit became involved with environmental training shortly after its founding and has developed a range of professional short courses and training programmes aimed at mid-career professionals, local and national government officials and politicians, and communities. Senior staff members also teach on formal university courses and programmes at UCT and other tertiary institutions in the Western Cape.

The interview focused on a particular short course which was run successfully for nearly 15 years. With the rise to prominence of environmental issues, the 'two-week course ... was seen as a vehicle for mid-career professionals who came from a variety of backgrounds' (Interview 7, Environmental short course, Science). While it ran, the course brought the unit lucrative income until the demand began to drop off, due mainly to increasing competition with formal programmes being set up around the country and the growing desire for courses that carry credit

³⁰ www.uct.ac.za/faculties/science/

weighting. The declining numbers and reduced income generation capacity has led the unit to consider terminating short course work.

Summer School, Centre for Higher Education Development (CHED) (Interview 8)

Faculty	Department	Programme/ Course	Type of course	Number of interviewees
Centre for Higher Education Development	Extra-Mural Studies within the Centre for Open Learning	Summer School	Short courses for general interest	3 lecturers

The Centre for Higher Education Development's said earlier role is to provide specialised educational expertise and functions that are essential to enabling the faculties to meet UCT's educational and strategic goals.³¹

The Centre for Open Learning (COL), established in 2005 within CHED, brought together two existing units – the long-established Centre for Extra-Mural Studies³², whose stated mission is 'to make the intellectual resources of the University more widely available' and the 'Third Term' (see interview 10).

The Centre for Extra-Mural Studies has offered non-degree-based public-interest courses for nearly 60 years. Its main programme – Summer School is described as the 'largest public education programme in the country'³³. Its annual programme of lectures and courses offers in-depth focus on traditional University subjects, such as the liberal arts, the natural sciences, history and culture, as well as offering some practical learning opportunities (such as drawing, language and computer training courses). The Summer School has consistently drawn thousands of interested individuals who attend courses on a wide range of topics. The Summer School courses are open to all regardless of educational qualifications³⁴.

³¹ www.uct.ac.za/faculties/ched/

³² The Centre for Extra-Mural Studies was founded in 1950, but has been moved between different departmental 'homes' over the years which reflected changing trends in the University's internal as well as national political policies (see Small, 2004 for fuller discussion).

³³ Summer School brochure. Monday 15–Friday 26 January 2007. Centre for Extra-Mural Studies, UCT.

³⁴ www.ems.uct.ac.za

Legal education short courses, Law Faculty (Interview 9)

Faculty	Department/Unit	Programme/Course	Type of course	Number of interviewees
Law	Professional Education Unit	Short courses	Short courses – with or without certificates of attendance	1 programme convener

The Law Faculty is a very successful professionally-orientated faculty offering qualifications in the legal field. The Law Faculty Website asserts that the majority of law students choose UCT's Law Faculty on the basis of the reputation of its graduates who are sought after in the market place.³⁵

The Professional Education Project offers seminars, lectures, short courses and certificate courses of a post-graduate standard, but these are run completely separately from the law degree courses. 'We concentrate on specific fields in education (where) there are new developments, and we are constantly updating and evolving: we try to keep people up to date in that regard.' (Interview 9, Legal Education short courses) The courses are offered in a variety of formats from one-day workshops; short courses of two or three days through to more intensive certificate courses. The Faculty sees the Professional Education Project as an income-generating programme.

Third Term, Centre for Higher Education Development (CHED) (Interview 10)

Faculty	Department	Programme/Course	Type of course	Number of interviewees
Center for Higher Education Development	Centre for Open Learning	Third Term	Single credit-bearing courses with formal assessment	1 lecturer

The Third Term Division, based in the Centre for Open Learning, offers UCT-accredited courses to local and international students during the University's winter and summer vacations. The Third Term programme is designed to offer students the opportunity to gain degree credit for courses outside the standard first and second terms (semesters). Term-length courses are compressed into a four-week block of lectures in either the summer or winter vacations. At time

³⁵ www.net.ac.za/faculties/law/

of the study, any student registering for Third Term had to be a currently registered student at UCT, or another higher education institution³⁶.

The Third Term programme was initially set up to allow students who had failed courses to catch up single-course credits that they needed to complete a particular year of their degrees. The idea of moving it to CHED was to broaden the course offerings from the Humanities Faculty to include other faculties in the University – thereby increasing student throughput and generating income through additional registrations (Interview 10, Third Term, CHED).

Although current students in the Third Term programme are not specifically adult learners, since the interview, opportunities to enroll for single courses have been promoted to the general public for 2008. The interview dealt with this proposed new direction and related problems which were being encountered – and thus had relevance for this thesis.

³⁶ www.uct.ac.za/continuinged/

F: QUALITY ASSURANCE POLICY FRAMEWORK FOR CONTINUING EDUCATION COURSES

1. Preamble

UCT obtains accreditation for its qualifications through the Higher Education Quality Committee of the Council on Higher Education (HEQC of the CHE), as the Education and Training Quality Assurance body (ETQA) with the primary responsibility for quality assurance for the whole higher education sector, as recognised by the South African Qualifications Authority (SAQA) (see the Higher Education Bill 2001, section 7 (1A)).

All UCT's currently approved qualifications are incorporated in a Programme Qualification Mix approved by the Department of Education. These are also recorded on the NQF. Any applications for new qualifications have to be submitted firstly to the DoE for approval, secondly to the HEQC for accreditation and thirdly to SAQA for registration on the NQF.

SAQA stopped recording short courses in November 2001. Since then SAQA's policy is that all short course providers are required to initiate the accreditation process with their ETQA. SAQA has specifically requested the HEQC to develop criteria for the quality and standards of short learning programmes, and to include short learning programmes in the institutional audit system for the higher education sector. The HEQC intends to delegate the responsibility for the accreditation of short learning programmes to higher education institutions themselves, provided that they have adequate systems in place to assure the quality of their short learning programmes. The HEQC's criteria for institutional audits include a criterion related to short courses. Institutions are expected to provide evidence of how their quality management systems are geared to dealing with short courses. Institutions which successfully meet and exceed the minimum standards and which provide evidence of their capacity to maintain effective internal quality management systems will be granted self-accreditation status by the HEQC. The HEQC will assess the QMS of institutions during their institutional audits. If the minimum standards are not met, institutions will not get self-accreditation status for short courses.

2. Definition and Scope

There is a long tradition within higher education institutions throughout the world of provision of a wide range of 'outreach' courses, projects and programmes which fall outside of provision of formal qualifications. Various terms have been used to describe these activities, including 'university extension', 'extra mural studies', 'adult education', 'non-formal education' 'lifelong learning' 'open learning' and 'continuing education' (Samuels 1992; Osborne et al 2004). The term used most frequently is 'continuing education' which includes a wide range of courses and services such as occupationally orientated

professional development courses, access courses, community education, and specialised training. In line with international trends the overarching term 'continuing education (CE)' will be used in this policy. This policy will cover all CE courses which are less than 120 credits or 1200 hours.

For the purposes of this policy four categories of courses are covered:

2.1 Courses which are taken for personal enrichment for which a certificate of attendance may or may not be required and which are not credit bearing e.g. summer school courses offered by the Department of Extra-mural Studies.

2.2 Courses which are taken to meet the requirements for continued professional registration, or continuing professional development, but which are not credit bearing

2.3 Courses which are designed to enable learners to obtain credits towards whole qualifications, or which would enable learners to get exemption from parts of a programme included in UCT's Programme and Qualification Mix (PQM).¹

2.4 Courses which are based on unit standards registered on the NQF within the higher education band, but not aligned with any programme in UCT's PQM

3. Academic Accountability

3.1 The Dean is accountable for assuring the academic quality of **all** continuing education courses offered by the faculty or departments in the faculty.

3.2 The Dean is accountable for providing annual reports to the Institutional Planning Department on all courses that fall within the scope of this policy (See 1.1 – 1.4)

3.3 The Dean is accountable for ensuring that academic staff who teach continuing education short courses over and above their normal teaching duties fulfil their responsibilities that form part of their approved work load, or for determining whether teaching on such courses should be treated as part of the normal workload of the particular staff member.

4. Criteria for the approval by the University of applications for granting credits for continuing education courses

(a) Courses that carry credits are subject to the same approval criteria and guidelines approved by Senate.

(b) The proposed outcomes of the course for which credit is sought must be clearly aligned with a qualification accredited in UCT's PQM.

- (c) The course must have a formal scheme of assessment which is open to external scrutiny and is aligned with forms of assessment used in the full-time course.
- (d) The award of credits for courses linked to unit standards registered on the NQF, but not part of UCT's PQM, can only be given if the requisite evidence of attainment of the standards is provided based on approved assessment criteria.
- (e) The application must provide evidence of the quality management systems in place to assure the quality of provision. The systems should cover arrangements for quality assurance, quality support, quality development and improvement, and quality monitoring and evaluation.
- (f) The application should indicate how the provision of the course is in alignment with UCT's mission and strategic imperatives.

¹ This will only be allowed where the full programme is designed in a way that makes this possible. Credit bearing courses offered by UCT must fall within the higher education band.

5. Internal Approval procedures

5.1 Courses taken for personal enrichment which are not credit bearing e.g. summer school courses

A proposal must be submitted to the Director of Extra-mural Studies, the Director of the Centre for Open Learning (COL), or the Dean in case of courses run in the faculties. The proposal must include a brief written rationale for the course or event, reference to the mission and strategies of UCT, potential clientele, and assessment of the quality of the lecturers, evidence of likely demand and outside support, timing, and break even and target participant numbers, and proposed venue. Where the course is being taught during term time approval of the staff member's Head of Department must be submitted with the proposal.

5.2 Courses which are taken to meet the requirements for continued professional registration

The proposal form must be completed. (See Appendix) and should bear the signatures of approval of the relevant Head of Department prior to its submission to the Dean. The proposal form must contain details of how the course is aligned with UCT's mission and strategies. Additional information should be provided about how relevant professional expertise will be utilised and how the professional body will participate in the design and evaluation of the course. Proposals for such courses require the approval of the Dean (advised by faculty academic planning committees and representatives of professional councils). Evidence of support for the course and the course outline should be provided by relevant professional,

employer or community groups. Information about these courses must be provided to the Faculty Board for noting.

5.3 Courses which are designed to enable learners to obtain credits linked to full qualifications that are part of UCT's PQM.

The primary decision about whether it would be possible for short courses to enable learners to accumulate credits towards a full qualification must be based on whether the design of the full qualification enables this to happen. The normal faculty approval procedures for processing applications for new courses must be followed. Information about these courses must be provided to the Faculty Board and the Senate Executive Committee for consideration and approval.

5.4 Courses which are designed to lead to credits for unit standards registered on the NQF

In the case of short courses designed on the basis of unit standards registered on the NQF, the proposal form must be completed. (See Appendix) and should bear the signatures of approval of the relevant Head of Department prior to its submission to the Dean. Information about these courses must be provided to the Faculty Board for approval.

6. Admissions

6.1 Students who successfully complete any credit bearing short courses will not be entitled to automatic access into the full-time programmes. Admissions decisions about such learners will be handled in accordance with policies governing admission.

6.2 Students who wish to attain credits from appropriately designed courses must register as bona fide students. The faculty office must ensure that the normal admission requirements are met, including the completion of any AARP tests that may be required, or that proper RPL assessments have been done in line with the RPL policy, before any student is registered for a potentially credit bearing course. The students would register either as occasional students or as students on a programme not approved by the minister for funding.

6.3 Subsidy would be claimed if the students have matriculated or admitted through senate discretion on the basis of the RPL policy.

7. Registration

7.1 Once a potentially credit bearing course has been approved by the Faculty Academic Planning Committee and noted by the Senate Executive Committee it must be listed on the Register of CE Courses in the Office of Registrar and allocated a course code.

7.2 Students who wish to enrol for a continuing education course which could result in UCT credits must register for the course on the central computer system using the allocated continuing education course code and a fees model approved by the faculty.

8. Record Keeping

8.1 Records of credit bearing courses will be maintained through the student record system

8.2 Records for **all non-credit bearing** continuing education courses, of biographical details and numbers of participants, must be kept by the relevant faculty office or the Centre for Open Learning. This is to enable UCT to provide certification and for annual institutional reporting purposes to the Institutional Planning Department. Biographical details required are full names, ID number, and prior educational qualifications. These records will distinguish between **registration, attendance** and completing the course.

8.3 The continuing education course register will be distinct from the **student record**.

9. Assessment

Where courses carry credits towards qualifications, the whole assessment regime applicable to all undergraduate courses applies; this includes external examination and the submission of results to faculty examination requirements.

10. Certification

10.1 Only students who have fully met the requirements of the short course may be issued with the relevant certificate. Faculty Officers are responsible for processing the certificates for persons who have successfully completed the continuing education courses.

10.2 The standard transcript will be issued for courses that carry credit.

10.3 Certificates for non-credit bearing courses will follow a standardised format and must reflect attendance or attendance and competency, as advised by the Course Coordinator.

11. Monitoring and evaluation

11.1 *Monitoring and evaluation of non credit bearing continuing education courses*

The course convenor or event organiser must produce a brief written report at the conclusion of the event, summarising the evaluation forms and any direct feedback from the participants. The brief report should include recommended action points associated with the particular event or for colleagues who might be organising similar activities. The report should be submitted to the Dean or Director of the COL.

The Dean of the faculty must undertake a review of the faculty's short course activities annually. As a matter of course, participants in each short course or event must be asked to complete an evaluation form at the conclusion of each event. These evaluations should be kept for the Dean to refer to. Notwithstanding the use of evaluation forms, participants should be encouraged to raise directly with tutors or lecturers any aspects of the course which they believe could be improved

11.2 Monitoring and evaluation of credit bearing continuing education courses in

Reviews of short courses offered by any department for the purposes of credit or continuing professional education must be included in the ambit of any formal academic reviews of the department.

Departments may find it valuable to conduct a follow-up review of its vocationally-orientated courses that are offered on a regular basis, to assess the impact of the course. A similar follow up review with participants' employers or the relevant SETA should also be considered, where the department provides a programme in collaboration with a company or SETA.

11.3 Institutional monitoring and evaluation

The Deans are responsible for monitoring policy implementation and impact. They will submit annual reports to the IPD who will prepare a consolidated report for the Quality Assurance Working Group, who plays an oversight role. QAWG will conduct a review of the policy every three years.

12. Staff Development

Each faculty should ensure that staff have access to training opportunities to develop the skills to design courses that are appropriate for adult learners, for continuing professional development and where appropriate to design courses to meet unit standards

13. Access to University facilities

Delegates registered for continuing education courses have access to library and computer facilities for the duration of their enrolment. Access to other facilities would need to be negotiated on a case-by-case basis.

G: POLICY ON RECOGNITION OF PRIOR LEARNING (RPL)³⁷

The document comprises three sections.

- **Section A** proposes a draft policy on Recognition of Prior Learning
- **Section B** expands upon Section A and provides additional information on critical issues relating to RPL.
- **The Appendix** considers possibilities for implementation of RPL at UCT

SECTION A:

Preamble

The National Plan Higher Education (2001) is based on the policy framework and the goals, values and principles that underpin that framework, outlined in the White Paper on Higher Education (1997). These are intended to develop a higher education system that will amongst other things:

‘promote equity of access and fair chances of success to all who are seeking to realise their potential through higher education, while eradicating all forms of unfair discrimination and advancing redress for past inequalities’; (p7)

The National Plan outlines the implementation framework for achieving the vision and goals of the White Paper. In line with the White Paper, it established indicative targets for the size and shape of the higher education system, including overall growth and participation rates, institutional and programme mixes and equity and efficiency goals.

The National Plan for Higher Education indicates that ‘an important avenue for increasing the potential pool of recruits to higher education is to recruit non-traditional students i.e. workers, mature learners, in particular women, and the disabled. The provision of higher education to workers, mature learners and the disabled, aside from the equity and redress imperatives, would also play a significant role in addressing the shortage of high-level skills in the short to medium-term, especially as there is a large potential pool of recruits. Increasing the access of workers, mature learners and the disabled to higher education is an important policy goal in its own right and should be approached as such’. (Ministry of Education, 2001, 28)

Despite this recognition of the importance of increasing the numbers of mature learners in higher education, a recent report on Human Resource Development suggests that very little progress has been made across the system in this regard. ‘In South Africa the further and higher education systems are characterised by a bias towards young, pre-employed students. Lifelong-learning opportunities for older, employed workers in colleges, technikons and universities are largely absent. Participation rates

³⁷ This draft policy document was formally approved by the Health Sciences Faculty Board, the Humanities Dean’s Advisory Committee (DAC) on 27 July 2004, the Science Faculty’s DAC on 20 August, and by a special CHED staff seminar on 23 August 2004. The Deans of Law and Engineering and Built Environment informed us that they had not received any major objections. There was a concern from the Dean of Law about the need to prioritise resource for student support to UCT’s traditional students. Comment from the Commerce Faculty is still pending.

in the FET and HET sectors compare poorly with the participation rates for other countries. The South African post-school education and training system has not modernised and massified to the extent of other systems in the world, which have adapted significantly to the needs of adult and continuing education'. (Kraak, 2003, 18 – 19)

There is a commitment at UCT to redressing inequities and supporting lifelong learning through widening access to adult learners. This commitment is based on a belief that there are able people with valuable knowledge and experience in workplaces and communities who could benefit from university study. In fact UCT has admitted a number of students over time through making use of the discretionary power given to the Senate in terms of the Matriculation Board regulations to admit students who do not have matriculation endorsement. The exercise of this power has been devolved to faculties and each faculty may take advantage of this discretionary power to admit adults with potential to succeed on the basis of an assessment of their prior learning and experience.

Recognition of Prior Learning (hereafter RPL), in the form of various kinds of 'alternative access' mechanisms, has therefore taken place in a number of programmes at UCT over a number of years, particularly at post-graduate level. However, an analysis of current practices at UCT reveals that there are no clear procedures for conducting an assessment of prior learning and experiences. Much of RPL presently relies on the academic judgements of lecturers. This is likely to continue to be a dimension of RPL given the focus on making judgements about whether candidates' prior learning and experience would enable them to succeed in an academic environment, rather than rigidly comparing performance against clearly defined standards. However UCT recognises that there is a need to make procedures more widely known and transparent, and to ensure more effective moderation of the assessment procedures and monitoring of student performance.

Recently UCT's Council approved the establishment of a Centre for Open Learning^{38†}. UCT recognises that there are significant opportunities for expanding the use of RPL to enable access into post-graduate programmes, articulation from other types of learning pathways, and continuing professional development programmes or short courses. The HEQC is also requiring institutions to provide evidence of an institutional RPL policy.

To address the policy vacuum and to provide an enabling environment in which student access to UCT can be expanded through RPL, UCT has developed a comprehensive policy on RPL.

1. Definition

^{38 †} The Centre for Open Learning (CoL) is in the process of being established within CHED. Its purpose is to make the academic resources of the institution accessible to a wider range of participants, to enable the institution to become more socially responsive, to facilitate improved throughputs and student mobility, and to generate income for the University.

In the University context, the recognition of prior learning (RPL) is the evaluation and acknowledgement of the knowledge and skills that a candidate has gained other than through formal study to enable them to gain access to higher education even though they don't meet the normal entrance requirements. This includes knowledge gained as a result of non-formal study, paid and unpaid work experience, community and organisational involvement, and individual inquiry. In the academic context, it is the acknowledgement that academically significant and socially useful knowledge is acquired through multiple formal, informal, and non-formal means. When evaluated through appropriate and reliable assessment practices, that knowledge can be used for purposes of academic access and accreditation. (For further information on varieties of RPL, and related epistemological issues which form part of the debate about RPL in higher education, see Section B).

2. Purposes of RPL

In the University context, the purpose of RPL is:

- To recognise and, where appropriate, grant advanced standing for the expertise gained by skilled individuals in non-academic contexts.
- To contribute to the holistic assessment and self-assessment of people entering onto a learning path.
- To enrich the academy and the curriculum by facilitating dialogue across sites of knowledge and practice.
- To facilitate access to higher education and provide redress for historical inequities.
- To promote and facilitate lifelong learning.

3. Principles Governing RPL at UCT

- UCT is a broad institution with multiple forms and sites of academic practice. RPL practices for specific programmes must be context-sensitive and framed to suit those differing contexts where RPL is deemed appropriate
- The evaluation of prior learning is an academic task and, like other forms of assessment, is done by academic experts in a given field, drawing on other experts as needed. Academics make the decision on whether to introduce an RPL access route into a particular programme of study.
- RPL is based on a developmental model, not a deficit model of adult learning; it builds on knowledge and skills that adults have already acquired.
- RPL is part of UCT's broader commitment to be socially responsive to key social needs, and to significant constituencies in government and civil society. (See Section B: RPL and Curriculum Responsiveness).

4. Guidelines for RPL process

The assessment of RPL candidates and the decisions concerning their admission are the ultimate responsibility of the Deans in consultation with the heads of department to which they are applying, facilitated and supported by the Centre for Open Learning, and drawing as needed on the expertise of other units in CHED.

RPL processes at UCT will typically be located in one of two sites, and will involve the following procedures:

4.1 RPL procedures where learners' choice of programme is clear:

- Adult learners seeking alternative access to a specific programme of study will approach the Admissions office or a Faculty office and will then be directed to the appropriate programme leader.
- Programme leaders seeking guidance or assistance in developing an RPL assessment process will approach relevant staff in the Centre for Open Learning for support.
- The outcome of the RPL process, including a written report by the assessor(s), will be forwarded to the Head of Department concerned. The Head of Department is responsible for ensuring that quality assurance requirements have been met. (See Section 8)
- The final decision regarding the admission of the RPL candidate to a particular programme of study will be made by the appropriate faculty committee or dean.
- Appeals concerning RPL results will be handled consistently with other forms of academic appeal. In cases in which RPL candidates appeal, the department or programme will provide written reasons for the decision and an explication of the inadequacies in the evidence of knowledge and skill.
- For the purposes of record-keeping and quality assurance copies of initial RPL assessment documents will be stored in the Faculty Offices and annual reports on the number of people assessed and admitted should be sent to the Institutional Planning department at the end of each year.

4.2 RPL procedures where learners' choices are not clear or where courses are offered through the COL

Where potential RPL candidates are not clear as to what programme of study they wish to pursue, they should seek advice from the Centre for Open Learning. In the future, it may be possible for the CoL to take candidates through a portfolio-development and RPL assessment process before referring them to an appropriate department or programme of study and recommending acceptance, where this is appropriate.

5. RPL and Academic Development

RPL must be used in ways that allow students a reasonable chance of succeeding in their studies, and provide sufficient academic support and appropriate and supportive pedagogical interactions. (See Section B: RPL and Student support).

In the case of undergraduate programmes, candidates who intend to register for a degree may enrol for foundation courses in the formative disciplines in order to gain exposure to foundational academic literacy skills necessary for coping with the academic discipline. Students can register as occasional students for these courses and then design an assessment portfolio. Ideally these students should be tutored by people with knowledge and experience of adult education and RPL. Candidates accepted into Postgraduate programmes may be required to follow an extended programme because of bursary requirements or because of the results of an RPL assessment conducted by the relevant lecturers. For example, in their first year of study candidates could register as occasional students for individually determined undergraduate courses and up to a maximum of one third of the postgraduate programme or they may be required to register for modules at other levels to address particular gaps that may have been identified in the RPL assessment process. Subject to satisfactory performance, in the second year of study candidates register for the postgraduate degree and complete the balance of the postgraduate programme.

6. RPL and Staffing

6.1 Opportunities for Staff development and training

Programmes and departments developing RPL processes are responsible for ensuring that academic staff have access to appropriate training and professional development, where available.

Administrative staff are often the point of first contact and the staff who help students negotiate the institution; they serve an important role in serving non-traditional students, including RPL candidates. Faculties should ensure that administrative staff involved in administering programmes with a significant number of adult learners have access to training (where available), designed to build their understanding of the needs of adult learners and RPL candidates.

6.2 Workload and Promotion Opportunities

RPL is recognised as an important and legitimate site of teaching practice and research. Academic staff who take the lead in such activities should be recognised as meeting teaching obligations and should be encouraged to publish research on their experiences.

7. RPL Assessment methodologies

RPL assessment methodologies include but are not limited to portfolios of evidence, interviews, demonstrations and simulations, observations, written and oral exams, letters of recommendation and other forms of expert testimony, case studies, and documentation of successful past learning experiences.

RPL assessment methodologies should be chosen based on their appropriateness to a particular context, learner, discipline, and programme. They may be chosen by the individual assessor or by those in the leadership of the programme in question. While the choice of methodologies is ultimately an academic function, UCT recognises the importance of learners' input into the decision-making process. The choice and use of a given set of RPL methodologies must be consistent with the UCT principles of assessment more generally.

RPL practices should meet key criteria for validating assessment practices, and in particular: transparency, fairness, legitimacy, attention to unintended negative consequences, and feasibility.

Faculties need to ensure that mature learners admitted through RPL are provided with the necessary support to acquire effective academic literacy in English, and to providing students with opportunities to use their home languages as a tool for learning, and to scaffold access to disciplinary discourses. In some cases, it may be possible and appropriate for RPL candidates to demonstrate their learning in the principle language of their professional practice.

8. Quality Assurance

Quality assurance in RPL is multi-levelled and multi-faceted. It covers:

- Academics who assess potential learners for RPL should design appropriate assessment methods that will allow judgements of past learning in relation to the outcomes of the particular course/programme.
- Sufficient evidence should be collected to enable judgements of different kinds of skills and knowledge of the applicant in relation to the entrance criteria of the particular course in which the candidate is interested.
- The head of department should evaluate the recommendation of the lecturer/course coordinator by examining whether the evidence provided justifies the evaluative judgement made by the lecturer.
- The head of department should also ensure that the assessment methods used to arrive at any evaluative judgements were valid and fair.
- The faculty needs to ensure that there are mechanisms in place to provide educational counselling and advice for adult learners.
- A review of the quality management systems related to RPL needs to be incorporated into the scope of the Academic reviews where appropriate. This should include a focus on assessment methods, moderation, support for students, curriculum review, and staff development.

- An open and transparent appeals process, including the explicit detailing, when requested, of reasons for any negative RPL outcome.
- Continuous review of procedures for RPL and success rates of students admitted via RPL should be conducted by faculties and annual reports submitted to the Institutional Planning Department.

SECTION B:

CRITICAL ISSUES RELATING TO RPL

1. Varieties of RPL

UCT recognises that different approaches to RPL are appropriate in different contexts, and that within UCT, programmatic and organisational contexts will play an important role in shaping the RPL process. The form that RPL assumes is also shaped by its purpose:

RPL for access recognises prior learning that has prepared a learner to enter an academic programme for which he or she does not have the conventional entry requirements. In addition to the assessment of academic readiness and the identification of academic developmental needs, RPL includes recognition of the content knowledge the learner has gained in the area of study for which he or she seeks admission. In the short term, RPL will likely be used most often for access purposes.

RPL for exemption recognises that a learner has sufficiently mastered the content of sections of a course of study through prior formal, informal, or non-formal means and therefore will exempt those sections of the course of study and replace them with an equivalent number of alternatives.

RPL for advanced standing recognises that a learner has sufficiently mastered the content of sections of a course of study through prior formal, informal, or non-formal means and therefore grants formal recognition for that knowledge. In most cases, this form of RPL will be used for the purposes of admission to a post-graduate degree.

RPL for lateral movement recognises that many forms of academic knowledge and skill are portable and relevant across disciplines and that qualifications in one area may, with appropriate interventions, serve as entry into study in another.

2. Further details on principles of RPL

- UCT is a broad institution with multiple forms and sites of academic practice. RPL practices for specific programmes must be context-sensitive and framed appropriately to those differing contexts.

- If RPL is to be a vehicle for bringing students into UCT who will be successful in their studies, this requires that appropriate academic support be available, and that pedagogical practice and curriculum must recognise diverse backgrounds and ways of knowing
- The evaluation of prior learning is an academic task and, like other forms of assessment, is done by academic experts in a given field, drawing on other experts as needed.
- The revisiting of prior learning on the part of learners is a learning experience in itself. Given appropriate academic contextualisation and institutional structure, in the future RPL may form part of an accredited academic programme of study.
- The knowledge and skills reflected in successful applications for RPL contribute to the fund of human knowledge and thus inform and enrich the curricular, pedagogical, and critical practices of the academy.
- RPL is based on a developmental model, not a deficit model of adult learning. It aligns with existing UCT practices for opening access to tertiary study through alternative means and builds on the knowledge and skills adults have already acquired.
- In general, RPL activities will combine assessment of prior learning with the exploration of the relationship between academic and other cultures of learning and between formal and informal knowledge domains, and will typically be linked to the creation of a plan for future learning.
- RPL assessment methodologies vary within academic contexts and will be chosen based on their appropriateness to a given learner, circumstance, or field of study.
- RPL is part of UCT's broader commitment to be socially responsive to key social needs, and to significant constituencies in government and civil society.

3. RPL and the Curriculum

3.1 The Epistemological Challenge of RPL

UCT recognises that knowledge is created, organised, and utilised differently across disparate sites of practice and that negotiating the relationship between them is one of the challenges of RPL. The relationship between academic curriculum and professional practice differs across programmes and disciplines, as does the mix of theoretical study, application, and interface with the broader society. RPL provides the occasion to interrogate curriculum, test epistemological and pedagogical assumptions, and recognise both the foundational principles and changing face of academic inquiry.

In the University context, RPL is premised on the expectation that adults acquire and, indeed, create knowledge through a variety of formal, informal and non-formal learning experiences. Adult learners especially need an environment in which their prior learning can be respected, a space to explore and articulate that prior learning, an opportunity to explore

the relationship between their prior learning and academic ways of knowing and guidance in developing an appropriate plan for future learning.

In RPL procedures in the University context, the assessment of knowledge, including prior learning, remains the domain of academics with expertise in a given field. Admissions decisions are made by faculty managers in consultation with appropriate academic staff, but guiding learners through the exploration of their own learning and the relationship of that learning to academic knowledge and discourse is an academic function. Academics will also take the lead in exploring the pedagogical and curricular possibilities opened by and through RPL, and in leading the epistemological debates that arise therefrom.

3.2 RPL and Curriculum Responsiveness

RPL participates in the on-going interaction between the academy and civil society. It recognises that this interaction contributes both to the University's knowledge-creation role, as well as its role of service to the broader community. RPL is an aspect of UCT's commitment to equity and redress and reflects its openness to a range of different forms of pedagogy and assessment. RPL recognises that the relationship between academic knowledge and the knowledge created in other sites of practice changes with disciplinary context or field of study, and can be the subject of healthy contestation.

3.3 RPL and Curricular Change

RPL processes that bring experienced adults into the academy provide the opportunity for mutual exchange across forms of expertise. Where appropriate, and depending on the disciplinary context or field of study, faculties and programmes may choose to create curricula tailored to such learners to accommodate and empower RPL learners whose self-worth may have been undermined in the past. Such curriculum-development provides the opportunity to revisit curricular structures and pedagogical practices created with school-leavers in mind and takes account of learning that has occurred in a variety of contexts. The academic exploration of current knowledge in the field that RPL invites contributions, in turn, to the development of interdisciplinary and innovative programmes and research.

3.4 RPL as a Learning Process

Like other forms of assessment, RPL has a diagnostic and evaluative function. However, UCT recognises that self-assessment and articulation of one's prior learning, the creation of a learning pathway, and the exploration of the relationship between experiential and academic learning is itself a learning experience. Where appropriate, faculties and programmes will develop credit- or non-credit-bearing modules in which such assessment,

self-assessment, and educational planning can take place. Even when not credit-bearing, such modules are more than assessment exercises but rather provide the opportunity to interrogate past learning experiences and explore the meanings of and possibilities for new learning.

4. RPL and Student Support

UCT is committed to the academic, intellectual and professional development of its student body, to the support mechanisms necessary for student success, and to the defensible use of resources as reflected in rates of through-put. RPL does not, therefore, exist in a vacuum. RPL mechanisms across the University must be embedded in broader structures of student support. These include a holistic assessment of learners' current levels of academic readiness; provision of appropriate opportunities for academic development (including language development), where needed; and support for portfolio-development and educational planning/advising.

Whatever their content knowledge of the field in question, learners applying for alternative access to higher education come from a variety of educational, professional and organisational backgrounds. Their preparation for academic work may be strong, they may have professional or organisational skills that quickly adapt themselves to academic contexts, or there may be a distinct gap between their content knowledge and their ability to express and utilise that knowledge in academic terms.

Evaluation of academic readiness and a plan for the academic development of such learners is therefore a legitimate part of the process of access. Such assessments, which seek to identify gaps in learners' academic preparedness, however, are not RPL as such. Rather, RPL mechanisms to assess and recognise the achievement of knowledge and skill are used along with assessments of academic readiness to develop viable learning pathways.

5. RPL and Academic roles

RPL affords academic staff the opportunity to develop their competence in the following roles:

- *Assessment:* It is a fundamental principle of RPL in the University context that assessments of prior learning are done by academics with expertise in the area being assessed. Assessors are thus drawn from the University ranks and from equally qualified colleagues in the field.
- *Advising:* Helping learners to explore and articulate their prior learning, become oriented to academic modes of communication and inquiry, and design learning pathways is an academic function.
- *Programme Coordination:* RPL is recognised as a site for programme development, curricular transformation, and innovations in learning and teaching.

- *Research*: RPL processes of assessment, development of academic readiness and curriculum transformation and innovation provide rich potential sites of academic research, and contribute to intellectual enquiry in the field of Higher Education development.

APPENDIX:

POSSIBLE SITES FOR RPL AND A PROPOSED IMPLEMENTATION STRATEGY

This section explores existing programmes, and potential new areas of provisions that could contribute to meeting social needs, and where RPL could help to facilitate access. The suggestions are based on the work of a sub-committee of the Centre for Open Learning Task Team, recommendations from a consultant, Dr Elana Michelson, who worked with the task team for a while and generated proposals for an implementation strategy and a list of possible opportunities for new RPL sites.

The following documents were analyzed to extract national and provincial growth and development priorities and needs:

- Ikapa Elihlumayo Growing the Cape (Provincial Trade and Industry Lekgotla 16 August 2003)
- National Critical Scarce Skills within the context of the HRD Strategy in South Africa – (report of an inter-departmental workshop)
- Framework Agreement on Growth and Development in Western Cape (November 2003)
- Towards 10 years of Freedom: Progress in the First Decade – Challenges of the Second Decade (produced by the President's Office at the end of 2003)
- NEPAD Action Plans extracted from the NEPAD web-site
- Western Cape – Provincial Government Socio-Economic Review 2003: Western Cape Provincial Treasury
- Proposals for an Expanded Public Works Programme – (Unpublished report of 1 July 2003)
- A Framework for developing a human resource and skills development strategy in the Western Cape: A Final Report (Department of Economic Development, 2003)
- Unofficial report on 'The Labour Market and Institutions of Human Resource Development' produced by Paul Lundall of the Development Policy Research Unit at UCT in 2003

1. Possible sites for RPL

A list of possible areas to explore for attracting adults learners to approved UCT programmes has been drawn up based on an analysis of the needs highlighted in the above documents. Access

could be expanded by developing new courses or initiatives, or adapting existing programmes, in the following areas:

1.1 FET colleges:

The recent study of the HSRC on Human Resource Development in South Africa has highlighted the importance of increasing the pool of people with intermediate level skills, which are at the old artisan level. The FET colleges have a critical role to play in this regard but relatively little work has gone into equipping the staff in the colleges to design effective curricula. Staff could be drawn into specialized education or management programmes working in collaboration with the School of Education, the Commerce Faculty and the GSB covering topics like curriculum design/development, academic management, quality assurance, career development, understanding the labour market, identifying and developing demand led skills programmes, educator training via new ACEs specifically designed for FET for colleges and schools.

1.2 Tourism and Heritage

Specialized training in the field of tourism and heritage studies could be offered to the following groups drawing on expertise within the University. The area of tourism has been chosen because it is a growth area in the Western Cape economy. UCT has a lot of expertise, which could supplement existing forms of training in tourism offered by the Technikons and the FET colleges.

The following areas of expertise exist at the University and can be drawn upon to develop specialized training courses on eco-tourism for local tour guides, tour companies and international tourists:

- astronomy
- botany
- geology
- ornithology
- entomology
- archaeology
- palaeontology
- history (historical sites)
- social and cultural history
- social reconstruction

- drama
- art
- music
- theatre

1.3 Clothing Sector

The clothing sector is critical to the local economy but more and more workers are being retrenched due to the inability of the clothing sector to survive international competition. The government has set aside a large amount of money to explore ways of strengthening the sector. Several members of the University's staff have extensive knowledge of the sector and good networks amongst workers and employers. CHED has an agreement with the Clothing and Textile SETA to train facilitators. Therefore this seems to be an area where we could potentially build on our expertise and make a meaningful contribution to the local economy through developing and offering customized courses for different constituencies in the clothing sector. Courses could be designed for managers, designers, unionists, and employers related to various aspects of the crisis in the clothing sector and exploring opportunities for growth and development.

1.4 Public Works programmes:

The government has set aside millions of rands for expanding the public works programmes as a way of accelerating infrastructure development and providing jobs at the same time. Many of these jobs would be aimed at unskilled and semi-skilled workers and the government has expressed a commitment to providing skills training for such work. However, there is also likely to be a need for more high level skills training to be provided in order to improve the management, planning and costing of the programmes as well as the more technical aspects involved in designing the various infrastructure programmes in areas such as transport, roads development and water. UCT would be able to integrate management training with various aspects of technical expertise required in relation to public works.

1.5 Community Site-facilitators in the Health Sciences Faculty.

For the past three years, there has been an initiative under way in the Health Sciences Faculty to explore professional development opportunities to Site Facilitator Staff, who currently supervise health sciences students during their community-placement modules. The Site Facilitators are UCT employees. Thus opening up access for them to pursue further studies could be an important precedent and 'redress' activity on UCT's part. It could be funded through the Skills Levy since the students would be UCT employees. It

might allow for the development of new curriculum initiatives organized around an innovative epistemological and pedagogical logic.

1.6 Industrial Health

The Industrial Health Research Group (IHRG) currently offers a range of non-certificated short courses to Health and Safety officers in industrial settings. If this provision were expanded, and made part of a formal, UCT qualification, there would be the potential for bringing in students from a variety of backgrounds, values, commitments, and social locations. This area of work could raise interesting issues about the relationship of science to other knowledges. Courses could be linked to Postgraduate diplomas in the Health Sciences.

1.7 MPhil in Housing Development and Management:

This is currently being re-designed. The faculty is trying to get World Bank funding for it, which, if successful, would mean that resources would be available.

1.8 Film and Media:

Opening up access to the Film and Media Studies programme would be a high-profile offering of UCT resources to an economic sector which is increasingly playing a significant role in local economic development. In this sector, community and media NGOs are already an organized grouping, and expanding this programme could open access to less well resourced people and a chance to enrich the student body with people who already have highly developed skills and alternative perspectives. A partnership with organisations in this sector would also offer the opportunity to place UCT's current students who want media apprenticeships.

If an RPL pilot was located here, it may be necessary to hire an additional staff member with the specific brief of working with adult learners. This would be an excellent site for some external funding. Companies could be approached and asked for the funding to support such a post. There might also be a chance to get funding from the MAPP SETA. Such an initiative might also act as a 'tap-root' to further study at postgraduate level, for example, the several post-graduate diplomas on African culture in the Centre for African Studies.

1.9 Other possible areas linked to the need to pursue equity imperatives, or skills development geared to growth and development priorities within the province

- disability studies
- construction economics and construction management
- property studies

- transport studies
- financial services/insurance management
- environmental and geographical sciences
- project management
- legal literacy and labour law
- gender studies

2. Proposed Implementation Strategy

2.1 Examine and perfect current practice

- Identify a current site of practice to be interrogated and transformed
- Conduct a participant research project on the current RPL practices and curriculum of that program
- Make needed changes in RPL practices, curriculum, and academic support
- Share findings with other sites of RPL practice and explore ways to apply lessons

2.2 Admissions and Registration

Formalise faculty admissions and recording-keeping policies and procedures in line with the institutional policy

2.3 Appoint an RPL coordinator in the COL

2.4 Initiate two pilot projects

- Identify two pilots, to begin in 2005.
- Fund-raise if necessary
- Interrogate curriculum and identify needed changes
- Liaise with AARP, Academic Development, Adult Learning Group etc.
- Design/Anticipate curriculum interventions
- Initiate a marketing and recruitment drive for potential adult students
- Admit first cohort of students
- Begin projects

2.5 Language, Multilingualism, and Applied Linguistics

- Liaise with the Centre for Applied Language and Literacy Studies in Africa (CALLSSA)
- Bring together a group of UCT academics to address issues of language, assumptions concerning academic 'deficit,' and RPL.
- Identify ways in which RPL and innovations in language research and policy can support each other.

2.6 Staff Development

- Design staff development opportunities for academics concerning RPL assessment, advising, curriculum implications, etc.
- Design staff development for PASS staff in faculties and the Admissions Office who may be involved in RPL
- Institute series of staff development activities
- Monthly seminars on RPL-related epistemological, pedagogical and curricular issues
- Develop and offer programme-specific Portfolio-Development and Educational Planning modules appropriate to pilot sites or else embed them in foundation courses in those programmes.
- Offer non-programme-specific Portfolio-Development and Educational planning course

3. Possible Funding Sources

Funding for RPL activities can be derived from the following:

- RPL candidates could pay a nominal assessment fee of R100;
- Where RPL portfolio development, educational planning and academic development comprise a course for credit, a standard course fee should be charged.
- Where external sources of funding are available, or where learners are not able to cover the full costs, an appropriate fee could be negotiated
- Where RPL candidates register for foundation courses as occasional students fees could be charged and the faculty can claim fee credits for these students. A scale of fees could be drawn up linked to means tests or whether external sponsorship is available
- Funding can be acquired through SETAs or from employers who can claim the money back if their skills plans include provision for the students studying at UCT

- Fundraising can take place for the specific purposes of supporting RPL activities, and for bursary support of RPL candidates.
- Funding for staff development within UCT can be claimed from the Skills Levy if these training activities are incorporated into UCT's skills plan.

Judy Favish, Director Institutional; Planning, 24 August 2004

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