



CONNECTION

Cultural OrgaNizationS
as LEarning and CommunicaTion
EnvirONments

Educational Materials and Training Curricula





Lifelong Learning Programme

Education and Culture DG

**CONNECTION – CULTURAL ORGANISATIONS
AS COMMUNICATION AND LEARNING ENVIRONMENTS**
Project number: 134326-LLP-1-2007-1-RO-GRUNDTVIG-GMP



CONNECTION

Cultural Organisations as Communication and Learning Environments

Training curriculum for cultural managers
Training curriculum for cultural professionals
Organisational development guide
Adult education methods

Project number:
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CONTENT

I. TRAINING CURRICULUM FOR CULTURAL MANAGERS	1
II. TRAINING CURRICULUM FOR CULTURAL PROFESSIONALS	7
III. ORGANISATIONAL DEVELOPMENT GUIDE	13
IV. ADULT EDUCATION METHODS.....	30
IV.1. Cultural organizations as adult education providers	31
IV.1.1 Educational Approaches in Cultural Organizations	32
IV.1.2 Education Methods Encouraging Active Learning and Social Constructivism	34
IV.2. Educational Approaches	44
IV.2.1 Cooperative Learning	44
IV.2.2 Discovery Learning	59
IV.2.3 Problem-Based Learning	62
What is Problem-Based Learning?	62
IV.2.4 Active learning	63



I. TRAINING CURRICULUM FOR CULTURAL MANAGERS

Organizational Change and Development toward Transforming Cultural Institutions into Community Learning Centers

Training Needs Assessment of the Target Group

This material is addressed to trainers and adult educators working in the field of culture and education, who are conducting or are interested in conducting training programs for cultural managers. The curriculum is offering a possible answer to the issue of what kind of training, which objectives and content should be offered to cultural managers, in order to provide them with those skills, knowledge and attitudes necessary for developing the educational dimension of their cultural organizations.

The use one can give to this material is flexible and diverse as the domain approached in this curriculum proposal is vast. A term of 30 hours is agreed by many professional already working in the field, as it was revealed by the needs assessment and preliminary testing conducted. At the same time, based on this curriculum proposal, one can develop training programs varying from a term of two days to a term of 3-4 years, as each subject can be treated in multiple ways.

It was not the intention of the project to produce a professional standard, a generally valid and applicable model, but to start from particular situations and come up with proposals based on facts. The initial research and needs assessment were carried out in five countries, in actual organizational contexts, trying from the very beginning of the project to embrace a variety of situations, organizational and professional backgrounds. The curriculum is set to reflect this variety, as it was tested in an interactive manner on groups of cultural managers from the five countries involved, and their opinions and reflections were taken into consideration in the elaboration of the final form. The curriculum emphasizes the learning objectives for participants, as it is the core around which any training program is being organized and defined. The different priority levels were set according to the actual options expressed by participants in testing sessions and this could be



considered one of the most significant results of the testing sessions for the curriculum.

Elements to be taken into consideration in the training program elaboration

- A general distinction of target groups and purpose of the course may be appropriate – experienced modern-thinking participants and networking/perspectives course or knowledge-hungry participants and ‘enlightening’, attitude-shifting course.
- The managers’ previous experience should not be underestimated; it should be used as a valuable learning resource.
- Learning experiences for managers are accompanied by an extensive exchange of information and practices – providing means for a continuing contact, for a network of partners or intervision groups, and all of these could be valuable assets for the training program.
- It is essential in the training process to give a particular importance to professional attitudes – a shift toward a community approach to educational activities must supplant the institution-centered (benign) mentality.
- Managers tend to express needs for personal development training and soft skills acquisition. Whereas this could be an attractive part of the training course, focus should not shift from Organisational Development (OD) and Lifelong Learning (LLL).
- Practical steps and on-the-job application planning and discussion are important parts of the training.
- The results from training courses and opportunities should be evaluated at all levels – satisfaction, retention, application, effect (this evaluation combines well with post-seminar, continuing activities in networks).

General Objectives of the Training Curriculum

- To encourage and motivate cultural managers to be agents of change within their institutions in order to provide life-long learning services;
- To present the context and latest developments of management and life-long learning to cultural managers;



- To stimulate and support the development of management competencies directed to the management of change and innovation in cultural institutions;
- To foster the exchange of best practices and experience among cultural managers and to establish a working network for transformation;
- To prepare, along with the Course for Cultural Professionals, the human and organizational network for change in cultural institutions.

In order to	Training Objectives	Training Topics
Choose between different perspectives for developing the educational dimension of cultural organizations		The necessities and opportunities of change
Trainees must be able to	<ul style="list-style-type: none"> ▪ analyze and identify most valuable cultural and educational assets/values/practices present within their organizations 	new developments in cultural services
Trainees should be able to	<ul style="list-style-type: none"> ▪ identify the main current trends in non-formal and informal education at national and international levels 	life-long learning
It would be good for trainees to be able to	<ul style="list-style-type: none"> ▪ correlate concepts and participative methods used in adult education with the current practice from their organization ▪ evaluate the educational potential of these assets/values/practices for different categories of public 	new consumer behaviors experience-based economy culture as a product/service
Establish a general direction for the transformation of their organization		The cultural institution as a community learning center
Trainees must be able to	<ul style="list-style-type: none"> ▪ review and develop their organization's mission and vision ▪ set strategic objectives according to both mission and vision, and stakeholders' demands 	analysis of existing services
Trainees should be able to	<ul style="list-style-type: none"> ▪ identify and analyze the external and internal factors influencing the life and development of their organization 	analysis of the characteristics and needs of the cultural product consumer (re)definition of the organization's cultural identity
It would be good for trainees to be able to	<ul style="list-style-type: none"> ▪ analyze and review their organization's structure and policies ▪ secure approval by and commitment of higher authorities 	building of a competitive advantage development of informal and non-formal learning services



In order to	Training Objectives	Training Topics
Make a strategic plan for change		Creating the organizational network of change
Trainees must be able to	<ul style="list-style-type: none"> ▪ identify opportunities and choose priorities ▪ set operational objectives to lead to the achievement of strategic objectives 	creating and promoting new institutional strategy: mission, vision, values, cultural policy
Trainees should be able to	<ul style="list-style-type: none"> ▪ identify key partners and stakeholders ▪ develop financial plans and a transformation budget ▪ identify funding sources 	<p>planning change: SWOT and PEST analyses, goal setting and scheduling, prioritizing, risk assessment, scenario development, decision-trees, monitoring and evaluation</p> <p>organization reprocessing: evaluating processes in organization, development of standard working procedures and standards of performance, critical path analysis</p> <p>marketing and public relations: attracting key partners and stakeholders, lobbying and advocacy, community development, marketing and PR strategy, organization brand</p> <p>resource evaluation</p> <p>project management</p> <p>cost-benefit analysis</p>
It would be good for trainees to be able to	<ul style="list-style-type: none"> ▪ establish schedules ▪ review ethical standards and internal procedures ▪ develop marketing and PR plans 	
Develop a human and organizational network for transformation		Securing resources for change
Trainees must be able to	<ul style="list-style-type: none"> ▪ promote positive relations with the community ▪ implement changes in the organizational structure and culture ▪ prepare and implement new working procedures and standards 	human resources development: training policy, recruitment, motivation of staff, internship programs, job descriptions, competency assessment, personal development planning



In order to	Training Objectives	Training Topics
Trainees should be able to	<ul style="list-style-type: none"> ▪ develop and maintain partnerships and relations with stakeholders ▪ solicit support from the private sector and from the government ▪ build volunteerism for their organization ▪ secure required facilities, equipment and information systems ▪ establish and maintain a performance evaluation process 	<p>private sector sponsorship</p> <p>volunteers' management</p> <p>lobbying and advocacy</p> <p>negotiation</p>
It would be good for trainees to be able to	<ul style="list-style-type: none"> ▪ lead advocacy efforts ▪ contract production and artistic services 	
Carry out the transformation process		Managing change
Trainees must be able to	<ul style="list-style-type: none"> ▪ support and encourage innovation within the organization ▪ build and maintain teamwork ▪ mentor staff on professional performance and development ▪ assign and organize work 	<p>teamwork</p> <p>leadership</p>
Trainees should be able to	<ul style="list-style-type: none"> ▪ assist and guide staff members, collaborators, authorities ▪ anticipate and manage crises ▪ develop and implement new processes, services, projects ▪ evaluate the quality of services, processes, marketing and financial results ▪ evaluate team and individual employee performance 	<p>coaching</p> <p>chairing meetings</p> <p>problem solving and decision making</p> <p>stress management</p>
It would be good for trainees to be able to	<ul style="list-style-type: none"> ▪ define staff recruitment and training policies ▪ coordinate the review of job analyses and job descriptions ▪ reinforce transformational targets for partners and stakeholders ▪ identify and develop appropriate channels for internal communication ▪ supervise budget management ▪ supervise new services promotion and marketing 	<p>process evaluation</p> <p>conflict management</p> <p>time management</p> <p>employees' evaluation</p>



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Training methods recommended:

Lecture/presentation
Role playing
Demonstration
Case study
Best practice sharing
Free discussions
Structured discussions

Duration: 30 hours (3 to 5 days in an intensive manner)

Training form: lectures and seminars, with a self-learning component.



II. TRAINING CURRICULUM FOR CULTURAL PROFESSIONALS

Training Needs Assessment of the Target Group

This material is addressed to trainers and adult educators working in the field of culture and education, who are conducting or are interested in conducting training programs for cultural professionals. The curriculum is offering a possible answer to the issue of what kind of training, which objectives and content should be offered to cultural professionals, in order to provide them with those skills, knowledge and attitudes necessary for developing the adult educational programmes in their institutions, focusing on a social constructivist approach.

The curriculum for cultural professionals was conceived in connection with the curriculum designed for cultural managers; it was one of the assumptions of the project that the organisational change and development needed for strengthening the educational dimension of cultural organisations can only take place if people from both managerial and executive levels are well prepared and if the process of transformation is understood and supported by both parties. The two curricula are complementary in their approach of adult education, and at the same time they can be used independently, as they focus on different sets of skills. Many of the observations and remarks made in case of the curriculum for cultural managers are also valid in case of the curriculum for cultural professionals.

Elements to be taken into consideration in the training program elaboration and implementation:

- Cultural professionals are eager to learn practical methods for planning and facilitating adult learning.
- Learning experiences for professionals should be accompanied by an extensive exchange of information and practices – providing means for a continuing contact, for a partners' network, and all of these could be valuable assets for the project and for the course.
- Strategies for handling difficult learners should be envisaged.



- The previous experience of professionals should not be underestimated; it should be used instead as a valuable learning resource.

- As it was the case for cultural managers training, it is essential in the training process to give a particular importance to professional attitudes – a shift toward a community approach to educational activities must supplant the institution-centred (benign) mentality.

General Objectives of the Training Curriculum:

- to introduce cultural professionals to the concepts of education marketing;
- to familiarize participants with the principles of adult education;
- to promote a change of attitude and perspective on the educational mission of cultural organisations;
- to get participants acquainted with educational programmes development and implementation within cultural organisations;
- to enable participants to use in their future work active learning methods in programmes designed for adult persons;
- to create a framework for debate on actively engaging adult persons in educational programmes based on the social constructivism approach.

Training methods recommended:

Lecture/presentation
Role playing
Demonstration
Structured discussions
Case study
Job assignment
Best practice sharing
Hands-on activities

Duration: 40 hours (5 days in an intensive manner)

Training form: lectures, seminars, assisted learning and tutoring.



In order to	Training Objectives	Training Topics
Develop an understanding of cultural organisations as education providers in the new social, cultural, educational and economic environments		Cultural organisations as education providers
Trainees must be able to	<ul style="list-style-type: none"> Identify the main characteristics of the educational market and the specific role to be held by cultural organisations in it, the current social and educational trends that influence it, the evolution of LLL policies in Europe and all over the world; 	<p>LLL policies and trends – national and European level, inter-sectorial synergies: education, cultural, social and economic development;</p> <p>New aims and topics in education: social inclusion, community development, learning to learn, arts for social change, education for citizenship and democracy, web 2.0 learning etc.</p>
Trainees should be able to	<ul style="list-style-type: none"> Define specific educational strategies for cultural organisations (museums, libraries, cultural and learning centres etc.); 	<p>Environment analysis – PEST, SWOT, marketing analysis (Porter's model);</p> <p>Present and future needs of adult public: skills development, social attitudes and perceptions, entertainment, knowledge improvement;</p> <p>Educational strategies of cultural organisations in communities;</p> <p>Education stakeholders in the community – who is interested in the educational programmes of cultural organisations.</p>
It would be good if trainees would be able to	<ul style="list-style-type: none"> Realize an environment analysis for their organisation: defining a place for our organisation – peer institutions, community and public; Identify the specificities of adults targeted by educational programmes – their present and future needs; 	
Distinguish the specificities of adults as a public of cultural institutions		Adults as a specific public of cultural institutions
Trainees must be able to	<ul style="list-style-type: none"> Identify the interests of adults and their motivation to participate in educational programmes; 	<p>Research and analysis of adult public characteristics, cultural and educational needs – methods and</p>



In order to	Training Objectives	Training Topics
Trainees should be able to	<ul style="list-style-type: none"> Perceive the specificities of the adult public - characteristics, cultural and educational needs; Know the characteristics of adult learning with a focus on social constructivism approach in education; 	<p>tools (group segmentation, use of surveys, social enquiry, focus-groups etc.)</p> <p>Characteristics of adult learning (andragogy elements); social constructivism approach in education; motivation of adult learners;</p>
It would be good if trainees would be able to	<ul style="list-style-type: none"> Design approaches in order to involve the adult public in the design of educational programmes. 	<p>Methods to involve the adult public in the design of educational programmes,</p> <p>Creation and strengthening of relations between cultural organisations and community leaders.</p>
Develop and implement educational programmes for adults		Development and implementation of educational programmes for adults
Trainees must be able to	<ul style="list-style-type: none"> Define topics, aims and contents of educational programmes; Define the structure of the staff involved in the development and implementation of educational programmes; 	<p>Developing the educational offer of a cultural institutions: factors to be considered and balanced – internal and external analysis, organisation's mission, vision and long-term plans, existing and potential resources;</p>
Trainees should be able to	<ul style="list-style-type: none"> Plan educational programmes: forecasting necessary resources and how to cover them, defining alternative scenarios; Identify the factors to be considered in the development of the educational offer of a cultural institution; Promote educational programmes. 	<p>Characteristics of informal and non-formal education, aims, approaches and actions;</p> <p>Design of educational programmes;</p> <p>Objectives, learning outcomes, content, methods, resources;</p> <p>Planning of educational programmes: financial, material and human resources;</p> <p>Human resources involved: roles and skills.</p>



In order to	Training Objectives	Training Topics
It would be good if trainees would be able to	<ul style="list-style-type: none"> ▪ Understand the specificity of informal and non-formal education; ▪ Define and use methods and tools for evaluating educational programmes – during their implementation and after they finalized. ▪ Use evaluation results in developing further institution's educational programmes. 	<p>Promotion and publicity of educational programmes: public relations, advertising;</p> <p>Methods and tools for evaluating educational programmes - continuous and final evaluation;</p> <p>Feedback and evaluation results to be used in further development of educational programmes.</p>
Act as an adult educator, trainer and/or facilitator		The cultural professional as an adult educator, trainer, facilitator and mediator
Trainees must be able to	<ul style="list-style-type: none"> ▪ Conduct educational sessions with adults; ▪ Use education, training and facilitation techniques for working with adult people; 	<p>Training skills, facilitation and mediation skills;</p>
Trainees should be able to	<ul style="list-style-type: none"> ▪ Know and apply educational methods for working with adults in non-formal and informal contexts. 	<p>Resources for a continuous professional development of adult educators;</p>
It would be good if trainees would be able to	<ul style="list-style-type: none"> ▪ To identify professional development needs of adult educators; 	<p>Educational methods for working with adults in non-formal and informal contexts.</p>



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III. ORGANISATIONAL DEVELOPMENT GUIDE

Organizational Development – Defining the Elements, the Process and the Need for Organizational Development in Cultural Organizations

The research implemented within European project CONNECTION on planning the activities of cultural organisations in five European countries and on the quality of organisational development processes in relation to local communities and beneficiaries pointed out a few aspects:

- the structures of organisations comply with certain standard legal requirements, without any relation to the typology of beneficiaries and to the actual relevance of organisations' activities;
- the size (expressed as number of employees) of departments is not linked to the amplitude of the related activities;
- the organisations' activities are developed based on top management decisions, or in order to comply with national requirements, and less as a response to beneficiaries' requests,
- usually, the plans developed are on an yearly basis and are less known by the majority of staff;
- the professional training of staff is not planned and does not aim at increasing the employees' professional performance;
- the assessment of beneficiaries' opinions is more informal, and there are no systems designed to discover the relations between activities and their beneficiaries.

The data gathered during the research do not reveal any programs aiming at the development of organisations. When a sort of OD processes were identified, such processes seemed to be management decisions whose motivations are unknown by the employees.

At the same time, many employees declare that they are interested in participating at training programs in order to develop their coordinating and management competencies.

The picture described above points out the need for developing and providing cultural managers with specific sources of information and with specially designed training programs.



The following concepts form a minimum methodology and guidance to be used both by cultural managers and trainers.

Organisational development (OD) is the top-down controlled process, aiming at the fulfilment of the organisation's mission and at the organisation's continuous adjustment to the changing environment. The OD process should integrate or subordinate the other processes within the organisation or those processes that affect the organisation.

For economic organisations, OD aims at increasing profits (or, at least, at maintaining their profits). For cultural organisations, OD may lead to:

- in the case of a museum: a) developing its collections, b) a better preservation of its actual collections, c) a better valorisation of its collections, d) a better education for its visitors, e) territorial expansion, f) increasing the number of its visitors, g) increasing the number of its employees, h) a more cohesive staff etc.;
- in the case of a library: a) increasing the number of its books, b) offering new services, c) increasing the number of readers, d) larger working facilities, e) a more balanced structure etc.;
- in the case of a performing arts organisation: a) increasing the number of spectators, b) increasing the number of sold tickets, c) increasing the number of performances, d) modernizing its performing hall, e) improving the communication between artistic staff and non-artistic staff, etc.;
- in the case of a cultural organisation with a mixed range of actions: a) increasing the number of events, b) increasing the number of local participants at events, c) increasing its financial subsidies, d) much more positive mass-media coverage etc.

Alongside with the abovementioned characteristics and situations, OD for cultural organisations is highly dependent on the state's approach of culture in general. This approach might vary largely, from the ancient *etatist* perspective of arts and culture as vehicles for the national/political ideology to the new public accountability demands of the neo-liberal state. Consequently, in certain cases, cultural organisations are used to promote political or ideological demands, while -in other cases- the OD of cultural organisation must aim at reaching economical or financial targets.



Cultural organisations differ from economic organisations from several points of view:

- they are creators, producers, conservators, promoters, multipliers, guardians and even censors of what constitutes the market of ideas and cultural values;
- they offer a type of services and products which has not changed for at least 3000-4000 years (this is the case of theatres) or for at least a few hundreds years ago (this is the case of public libraries);
- their products and services might be very perishable; however, the values presented and/or promoted by them do not necessarily share the same characteristics;
- the perception of beneficiaries on the value of the offer made by cultural organisations changes very fast;
- the cultural content of a specific cultural service/product changes at a pace slower than the emergence speed of competing products/services;
- the return of investment in culture is a very lengthy process;
- the increase in the allocation of resources for producing cultural products/services does not match an equivalent increase in productivity.

From a theoretical point of view, OD is approached as: organisational change, organisational reengineering, and organisational effectiveness. Some approaches emphasise the psychological content of an organisation; others focus on organisation as a social system, while others underline the learning process comprised by OD.

Although there is no common understanding of **what** is OD, it is generally accepted **why** and **how** is OD implemented.

OD involves concepts such as:

- vision;
- mission;
- organisational culture;
- structure;
- internal and external environment;
- stakeholder;
- need;
- short and long term objectives;
- public/beneficiaries.



OD uses tools such as:

- SWOT, PEST, PARETO analysis;
- risk matrix;
- GANTT;
- plan;
- questionnaire, focus group, interview;
- budget.

OD comprises processes such as:

- creation of a vision;
- formulation of a mission;
- definition of objectives;
- analysis of needs and environment;
- planning and plan implementation;
- monitoring, evaluation and control.

Although there is no recipe for OD's implementation, it is possible to use a tracking method that can help at achieving better results. In practice, it is possible not to use all the tools and not to go through all the processes at the same extent. Instead, it is important for a manager to be aware of the existence of different tools and approaches, and to use the most appropriate ones according to the specific situation which may occur.

OD appears as a response of the organisation to a specific input. Also, OD is a way to satisfy a specific need, expressed by any of the following: the manager, the organisation's staff, the external stakeholders, the beneficiaries, the suppliers. Very often, OD is seen as a way to make the organisation more adequate to its external environment.

Although OD addresses certain external input or need, the OD targets the internal components of the organisation. All the actions implemented during the OD process are designed to change, improve, modify or alter in any other way the inner *structure* of an organisation.

All the abovementioned topics will be further presented.



Internal and External Analysis - Identification of Needs

The OD process is possible and necessary when (Gleicher, 1969) *dissatisfaction x vision x first steps > resistance to change*. What is the meaning of this model? First of all, dissatisfaction is the expression of a need. If somebody says that s/he is not satisfied with the exhibitions of a museum or with the services of a library, such complaints may be construed as the need for better exhibitions or services. Secondly, the dissatisfaction expressed by somebody should match that somebody's vision on a new or improved or modified situation. Finally, OD can really be started when certain measures have already been taken. In other words, OD cannot be started as a brand new project or activity (in our examples, a few items in the exhibitions have changed or a small service is already in place for users). When someone's needs meet someone's vision and some actions have already been taken, all the requirements for OD are met and the process can start.

The first element required in order to enable an OD process is the **vision**. The vision is an ideal, a “beautiful” image about a future situation or status, a projection on how things could be in the future. The vision that will guide the future process of OD needs to be clearly formulated and officially recognised by its creator. Also, such vision needs to be clearly communicated to others, both from inside and from outside the organisation. If the vision is not clear or is too intricate, the OD will easily fail or will face a lot of opposition.

The second element for the early stage of OD is the **mission**. While the vision is related to an individual, the mission is related to and connected with an organisation. The mission is stating the reason for existence of an organisation and it indicates in general terms its area of action. Similarly to the vision, the mission is a declaration of intention containing elements indicating the future path of the organisation and needs to be credible and expressed very clearly. A mission should be officially related to a specific organisation, known and accepted by such organisation's staff and easily attached to such organisation by those from outside the organisation at issue. Usually, the mission can be identified as an official “mission statement” of the organisation. The vision and mission of a cultural organisation need to be very attractive in order to facilitate the support from those affected by the future OD (staff, beneficiaries, stakeholders, etc.). Sometimes, the internal acceptance of



the mission at all the levels of the organisation can constitute the core and purpose of the OD process.

The third element required for the initial stage of the OD process is represented by the **objective(s)**. The objectives must be very realistic and expressed in measurable terms. The mission shows the destination, the objectives indicate the short, medium or long term targets. The objectives need to precisely describe what will be achieved through the OD process at specific times. The success of the OD process will be evaluated against planned objectives. Such objectives should be accepted by the organisation's staff and acknowledged by its external stakeholders.

It is on the manager's "job description" to formulate the vision, mission and objectives of his/her organization. On the other hand, it is not uncommon for the vision, mission and objectives to be formulated by one person, and to be accepted and pursued by a different person. Those three elements can be formulated by a person from within the organisation or by specialised external experts. It is only when these elements are in place, clearly and undoubtedly accepted by everyone who may be affected, can the next stages start.

Internal and external analyses will be made on the basis of clearly formulated objectives. These analyses will point out the needs for OD. Those needs might be later on turned into projected results of the activities within the OD process. The previously described elements (vision, mission and objectives) are developed and communicated by top management to the organisation's staff and external stakeholders without involving the latter. Internal and external analyses are focused on the organisation's staff, structure, culture and resources and on its exterior environment (competitors, suppliers, and beneficiaries, financial or administrative stakeholders). These analyses will use the formulated objectives as working assumptions. The analyses will involve, actively and at different extents, the organisation's staff, beneficiaries and/or stakeholders.

The **internal analysis** will offer a good insight on those aspects on which the OD will act later. The internal analysis aims at revealing the weaknesses or critical points where intervention is required. The



analysis will pay attention to the following components of the organisation:

- structure. Is the current structure adequate to the size and competencies of its current staff? Is there cohesion between the structure and the mission of the organisation? Is the organization's structure in line with the needs of its public/beneficiaries/stakeholders? If the answer to any of those questions is negative, the OD might address and solve the issues. On the other hand, the analysis may reveal a solid and coherent structure. In this case, the OD will be developed and implemented using this positive situation as an asset.
- organisational culture. Are the staff's beliefs coherent with the mission of their organisation? Are there any conflicts between the different categories of staff (artistic vs. non-artistic)? Is the staff dedicated to the organisation as a whole? The future OD process should address any potentially negative cultural aspects. If the analysis shows a strong and positive culture of the organisation, the OD shall have to use this as a powerful implementation tool.
- resources. Are the organisation's resources adequate to its specific profile and activities? Are such resources at an optimal level? Are such resources properly used? Answers to this kind of questions will allow the OD manager to pay a special attention to the related issues during the OD process. When resources are adequate and properly used, the implementation of the OD will be significantly facilitated.
- staff. Is the staff in line with the organization's management vision and with the organisation's mission? Is there enough staff? Is the staff qualified for the activities assigned to it? Are the job descriptions and working procedures in line with the staff's competencies and with the organisation's activities? What motivates the staff to work in the organisation? Any weak points discovered will require interventions during the OD implementation. All the positive findings will be used to support the OD effort.

The external analysis will focus on:

- organisation's beneficiaries (customers). Are the beneficiaries acquainted with the organisation's activities and cultural offer? Are the beneficiaries involved in the development of the organisation's activities? Are the beneficiaries satisfied with the organisation's activities? Are the beneficiaries loyal to the organisation? How are the beneficiaries' opinions perceived by the organisation? To what extent are the beneficiaries' opinions included in the evaluation of the



organisation as a whole and of its activities/cultural offer? Depending on the quality of the answers, the OD will use them to boost the future interaction of the organisation with its beneficiaries.

- organisation's stakeholders. Are the administrative or financial supporters satisfied with the organisation's activities and results? Do stakeholders pay attention to the organisation's needs and difficulties? Are there any requests from the stakeholders that were not honoured by the organisation? If the analysis shows only a minimal support from the stakeholders or their high level of dissatisfaction, the OD must address those issues and solve them in a sustainable manner. On the other hand, if the organisation's stakeholders are really interested in its future, the OD process must make a good use of the situation for the benefit of both the organisation and of its stakeholders.

- organisation's suppliers. Are there enough professionals in the artistic/cultural fields available for the organisation's activities/projects? Are there enough resources available for the organisation? Is the organisation able to negotiate with suppliers, or do they have the strongest position? Is the acquisition cost in line with the organisation's financial capacities? Answers to such type of questions will show the internal components of the organisation on which the OD will implement actions.

- organisation's competitors. Who offers the same type of cultural products/services? Which is the territorial distribution of its competitors? Do other organisations compete for the same resources or public? Which measures have been taken to address competition? Are those measures adequate? Does competition relate to the content of the cultural offer, to its price, or to any other issues? A more adequate reaction to competition will be developed during the OD process only if the organization's knowledge of its competition is very thorough.

- replacement products/services. Do beneficiaries prefer other quasi-cultural "temptations" (internet, TV, open space activities, etc.)? How affordable is the organisation's offer for its beneficiaries as compared to other opportunities? Should the answers put the organisation at a disadvantage, the OD process must offer adequate measures in order to make the organisation's products/services more affordable.

The external analysis may look at the **technical** developments (new technologies like web 2.0, social networks over the internet, mobile or computer applications, HDTV may pose a threat to "classic" cultural products), at the **political** environment (election results, political



coalitions, modification of approaches may threaten also the cultural organisations), at the **social** environment (migrations, labour market, gender and discrimination issues can lead to OD) or at the **economic** environment (the relation between the productivity of economy and the cost of life, exchange rates, the crisis of raw materials may influence cultural organisations).

Properly implemented internal and external analyses will provide a lot of valuable information about **why** to proceed to OD. These aspects, which constitute reasons for initiating the OD process, can become clear only if a proper analysis is conducted.

Note must be made of the fact that OD can focus only on the internal elements of the organisation. Any positive aspects from outside the organization can only be used within the process. Any action taken during the OD process will have direct effects on the internal components and will directly engage the organization's internal strengths for a successful development. External factors, either good or bad, will have an influence on the OD actions, but they will never be under the control of the OD manager. For this reason, any attempt at changing or altering to any extent the external environment of the organisation is only a waste of time, resources and energy.

The internal and external analyses may confirm or not the initial assumptions (projected objectives). In the first case, the analysis can underline what can be used from inside the organisation and from outside it for designing the activity plan in order to achieve the OD objectives. If envisaged objectives are shown to be unrealistic or irrelevant, the analyses will lead to real objectives for OD design.

The internal and external analyses can be realised using **tools** such as: SWOT diagram, risk matrix, Pareto chart, questionnaires, interviews, comparisons, benchmarks, cost-benefit analyses etc.

OD Planning

OD process is neither linear, nor static. OD is a dynamic, adaptive process. From one point of view, the planning of OD is very similar to any planning process; from another point of view, it is a very specific one as the OD aims at affecting an entire organisation, not only a limited project or a limited set of activities.



The planning process of OD involves a series of steps as:

- 1) Creation/review of the organisation's mission;
- 2) Drafting of long-term objectives for the organisation;
- 3) Identification of its development needs and of those persons affected by the development process'
- 4) Internal and external analysis;
- 5) Design of different development options;
- 6) Obtainment of support from those persons affected by OD;
- 7) Design of OD's implementation plan;
- 8) Implementation of OD plan;
- 9) Monitoring, evaluation and control.

The above-presented planning steps are meant to help OD managers to keep the OD process on track. Another useful approach on planning and implementing OD is to consider such process similar to the process of organisational change. According to this approach (Lewin, 1958), there are three main stages: unfreezing – change – refreezing. During the unfreezing stage, the need(s) for change become visible, preliminary analyses are implemented and an action plan for the second stage is designed. During the change stage, changing activities are implemented; the “new” organisation is put in place. During this second stage, a wide learning process will occur: the organisation's staff learns to be comfortable with the “future” organisation, with its new rules and procedures; stakeholders and beneficiaries will learn about new and improved ways to interact with the organisation. During the on-going evaluation of the second stage, the conclusions may lead to a modification of the implementing plan. In this case, the change process itself will require modifications. During the third stage, the changed organisation starts functioning in accordance with the new model. The organization's structure, culture and operational rules are changed. The results of evaluation during and after the third stage may lead to modifications on the second stage. More importantly, after the end of the third stage, the entire process will start over again.

There are many and different ways to design an OD plan. The method itself is less important, what is really important is to keep the same method both during the design stage and during the implementation one.

The following description of methodology will follow the 9 steps briefly presented above. The steps 1 to 4 were already presented in the



sections 1 and 2. There is an important aspect to be underlined about the OD's planning process. The planning stage must to be time-limited. For instance, the setting of objectives might only take 2 days, the need assessment must be limited even if the internal/external analysis leads to changes in the objectives (and sometimes this really happens). What is worst than a weak OD process is not to start this process of development. How long the planning process will take depends from one case to another.

The steps from 5 to 9 will be presented below.

Before designing the implementation plan, based on the results of the internal and external analysis, the plan designer will point out different **implementation alternatives**. Those potential alternatives are based on the specific of cultural organisations, depending on aspects such as:

- cultural values are at the same time stable (their content might suffer very little changes during long time periods) and very changeable (being actually highly influenced by the way people perceive and adopt them);
- different human communities appreciate the same cultural value in different ways;
- production of cultural values requires expenses which can be recovered rather after a long time;
- some cultural values present interest only to a limited public; however, they need to be preserved and presented.

Whatever the objectives are, a specific objective can be achieved in different ways. For instance, the proposed objective for OD is to reduce by 25% the number of an organisation's departments. This objective can be reached by means of: a) reducing personnel numbers; b) modifying the official structure of the organisation; c) dividing the organisation. Another objective might be to achieve a better understanding or acceptance of the organisation's mission by its staff. This objective can be reached by the means of: a) organising a series of HR events (team buildings, soft-skills training sessions); b) establishing a system of meetings between the manager(s) and the staff; c) modifying the communication systems and procedures within the organisation.

Any of the above is a realistic alternative; however, the OD should focus only on one of them. It is important for a manager to be aware at this stage of the possibility that there are several approaches to reach an OD objective. Such alternatives result from internal/external and need



analyses. The decision on which alternative is to be followed must be based upon the results of the same analysis. The decision will select the alternative that presents the lowest risk of failure. The decision-making process will involve a limited number of persons (experts, managing board members, etc.) and will use tools and techniques such as: focus group, Delphi group, expert evaluation, risk assessment, statistical analysis, etc.

The alternative that has been chosen will be communicated to those persons affected by the OD in order to **obtain** their **support for OD**. The OD process will require money, resources and time; also, it might fail. For those reasons, organization's identified stakeholders, (current and potential) beneficiaries, staff must be informed about the OD. Gaining the support from those persons affected by OD may be similar to marketing and public relations activities. During this stage, the OD process needs to be communicated and explained both inside and outside the organisation.

One stakeholder may offer money, another one may lobby decision makers, and another one may open the way for a specific target group. If the future OD process is not transferred to stakeholders in such a way as to allow them to take psychological ownership over it, the entire process will be useless and will face a lot of opposition. If the stakeholders feel comfortable with the proposed OD, they will offer their support, in moral, financial or material terms.

Employees need to accept the future process: some of them will be fired, while others will be promoted. For this reason, employees have either to take ownership over the OD, or to understand that they are no longer necessary. Employees need to have a deep understanding of OD's finality. When employees fail to understand what the purposes of OD are, they might fight it. Should they understand and accept what is about to happen, they may become OD's strongest supporters.

The organisation's beneficiaries need to be aware about of the fact that their organisation will develop new approaches within its actual activities, or of the fact that some departments are going to disappear, or of the fact that the organisation will divide, and services that used to be in its portfolio will be provided by other organisation. If beneficiaries are not informed about the organization's future activities and programmes, they will easily turn to another similar organisation or to



replacement product/services. In order to gain and keep the public's attention, marketing and public relations tools will be used.

Gaining the support of those persons affected by the OD will involve tools and techniques such as: press conferences, press releases, special events, printed promotional materials, procurement of services from specialised advertising companies, interviews and questionnaires, working groups, meetings, negotiation, persuasion, setting up a system of rewards and penalties, etc. During this stage, it is particularly important to monitor and evaluate the process on a daily basis. Evaluation results allow to return to the objectives and need assessment (internal/external analysis) and to make certain changes, if necessary.

The design of OD's implementation plan will be based on the achievements from previous steps. The implementation plan will include: a) the objectives to be achieved; b) the target group(s); c) the addressed needs; d) the list of activities and their terms; e) the envisaged results; f) the resources to be allocated; g) the monitoring/evaluation/coordination plan. The implementation plan will make reference to: verification indicators, information sources, risk assessment and related risk responses. The person in charge with the planning process needs to pay attention to the fact that the DO will exert action upon the internal environment of the organisation in order to make it more adequate to its external environment. Another aspect that may prove useful is to pay attention to the fact that OD must lead to a cultural organisation integrated in the community, able to contribute to the general development of that community.

The planning process will end with a written implementation plan. Having a written plan will offer several advantages: a) a reduced chance of error; b) the existence of a reference system which may enable monitoring and evaluation processes; a) reference documents to be used by stakeholders, etc.

The implementation plan will be created by using tools such as: GANTT chart, budgets, ready-made planning software etc.

As the OD will affect the entire organisation, its implementation requires a lot of attention from the OD manager. OD's implementation will be discussed in Chapter 4 hereof.



Monitoring, evaluation and control activities will be implemented during and at the end of the OD process. **Monitoring** is an on-going process during the entire implementation term, which will provide a “real-time” picture of the implementation process. Monitoring will supply sets of quantitative and qualitative data (number of visitors, number of complaints, percentages of different values). **Evaluation** is a comparison made between envisaged results and actually achieved results. Evaluation will compare OD’s to-date evolution against planned benchmarks. Evaluation will show the deviations from the planned status (if any). **Control** is meant to take appropriate measures in order to keep implementation within the planned limits. Sometimes, control measures will lead to slight changes in the implementation plan. If evaluation and control lead to significant changes in the original plan, the entire OD process needs to be rethought. Tools used for monitoring, evaluation and control purposes may include: questionnaires, reporting sheets, comparative analysis, cost-benefit analysis etc.

All the above stages are described in a logical sequence, not necessarily in a chronological sequence. From a practical point of view, certain stages can be more visible than others. What is really important is that OD can only be successfully implemented by following a method.

OD Implementation

A special attention has to be paid to the implementation stage of OD. Even very well-planned OD processes failed due to implementation errors. A successful OD process can be implemented when:

- a “learning curricula” was designed in order to facilitate the learning process for the “new” organisation;
- specialised expertise was involved to help the implementation of some activities;
- the expectancy level for success is moderated;
- the money *per se* is not very important; however, its existence and the real ability to obtain it are important;
- OD is not only a quantitative growth;
- planned objectives were changed if the situation so required;
- good quality culture does not mean only “high” culture;
- consideration should be given to the fact that loyalty of beneficiaries of cultural products/services can be hardly achieved and easily lost;



- each activity must be properly implemented in order to achieve the planned results;
- level of support from stakeholders is high during the entire process;
- deadlines are observed.

OD is mainly a learning process that targets both the interior of organisation and its exterior. Inside the organisation, staff will become comfortable with the organisation's mission, with its new rules of conduct and work, with its modified structure, with its new procedures. Outside the organisation, stakeholders, the public, competitors and suppliers will learn how to deal with a changed organisation with a different behaviour.

During the implementation stage, planned activities are implemented:

- training sessions for staff;
- meetings with stakeholders;
- marketing actions;
- negotiations with staff members;
- meetings with staff;
- acquisition of cultural and technical goods;
- installation of new devices;
- training sessions for staff;
- meetings with stakeholders;
- internal and external marketing.

OD implementation must also achieve a balance between the cultural specific of the organisation and the technical requirements of the process. From a technical point of view, implementation is a strict pursuit of the plan. Activities need to be undertaken as planned, the term for each working sequence should be respected, results should be obtained as envisaged. On the other side, the cultural/artistic components of the organisation's activities could contravene the plan: rehearsals for a new performance might require more time than planned, musicians from orchestra might go ill, excavations for an archaeological research might be delayed by bad weather, a book's author might delay the book's delivery, the painter might change his/her mind and his/her painting is not exhibited in due time.

Depending on the objectives of the OD plan, the implementer may face delays, lack of resources, staff withdrawals or stakeholders' refusals. If OD aims at improving the link between the mission of an organization



and its acceptance by the staff, the mobility of personnel may jeopardise the entire implementation schedule as new staff need first to become comfortable with their new working place until they are prepared for a deep integration. In this case, a possible solution is to organise a recruiting process in such a way as to allow the employer to select the individual who is already comfortable with the organisation's mission.

If OD aims at providing cultural services more adjusted to the needs of the local community, the advent of a new competitor may steal the organisation's public. This situation may turn the entire redesign process into a meaningless work. The implementer should go back to the implementation alternatives and try to identify a new approach in order to finalise OD implementation.

It is possible to find that two different organisations are experiencing OD processes that aim at improving their employees' working environment. Even if both organisations are working in the same field (museums, theatres etc.), having, however, a different status (one is State-owned and the other one has private shareholders), the implementation of OD may significantly vary. For instance, the publicly-owned museum may face a budgetary cut-off, or a change in its political stakeholders due to election results, while the private owned museum may face the withdrawal of a number of its managing board members or a drastic change in financial rules. Implementation processes in those organisations will differ even if OD plans aim at the same thing. OD managers can mainly use the implementation plan as their only working tool. There is no pre-design manual on how to implement a plan. The best rule is probably to comply with the schedule and to be able to give up an idea which already took too long to implement or is already too expensive.

Characteristics of OD Managers

OD's final aim is to have at the end of the day cultural organisations more adjusted to their environment, able to really contribute to the general development of the communities. Cultural organisations are more than mere keepers of cultural heritage or entertainment providers. Cultural organisations are, from many points of view, providers of informal and non-formal education. This characteristic is not very well known even inside a cultural organisation.



OD managers have to understand that a cultural organisation should create and provide to the public an educational environment. And for that to happen, the organisation itself needs to turn into a continuous learning environment for its staff and managers altogether. If managers are not able to think “outside the box” they can hardly help their organisation to become more creative in offering better and diversified cultural products/services. OD managers need to enable their organisations to actively learn from their beneficiaries how to deliver appropriate products and services.

On the other hand, cultural organisations not only educate; they also communicate different ideas and knowledge. The research implemented during the CONNECTION project shows that cultural organisations communicate too less and not very well. Lack of communication is present both inside and outside a cultural organization. This usually happens when the organisation has not enabled proper communication systems.

An OD manager must be able to communicate, not only to send and receive messages. OD managers need to have good knowledge on communication systems, on how they work and on how they can be established.

OD managers need:

- strong negotiation skills in order to gain a proper and active support from their organisation's stakeholders. Also, good negotiation skills are required in order to obtain acceptance of the OD aims by their organisation's staff.
- to be able to manage long term budgeting. OD is a lengthy process: it may have a term of many years. Good skills with cash-flow management are required.
- good management skills and the ability to understand the fields of activity of their cultural organisations. A museum is different from a library, which is not the same with a theatre or an opera house. Those differences must be understood by managers in order to be able to adapt a specific management tool or technique to a specific organisation.
- strong leadership skills and competencies in order to be able to lead an organisation's staff to the end of the OD process. Also, OD managers should be very creative and innovative in order to anticipate the future needs and requirements of their organisation's beneficiaries.



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As there are no receipts for OD, there are no typical OD managers. The best OD managers are those who enable their cultural organisations to be more integrated in their communities.

Further readings:

- <http://www.museumlearning.org/>
- http://www.chin.gc.ca/English/Digital_Content/Research_Quality/motivation.html
- <http://www.worldofbiography.com/9059-Kurt%20Lewin/>
- http://alumnus.caltech.edu/~rouda/T3_OD.html
- http://en.wikipedia.org/wiki/Organizational_development
- <http://www.tenstep.com/>
- <http://www.human-synergistics.com.au/content/products/processes/ids/organisational-development.asp>
- http://www.managementhelp.org/org_chng/org_chng.htm
- <http://ica-international.org/index-en.html>
- <http://jab.sagepub.com/cgi/content/abstract/30/3/297>



IV. ADULT EDUCATION METHODS

IV.1. Cultural organizations as adult education providers

Education in cultural organizations traditionally encompasses non-formal and informal education, although is not mandatory to limit itself to it. Adult education provided by cultural organizations can be assimilated to non-vocational adult education (NVAE), a social policy and social movement comprising adult learning in both formal and non-formal contexts not directly linked with the labor market and not requiring any specific qualifications to enter. The purposes of non-vocational education are to engage the learner to achieve personal, social, civic and cultural aims, to promote social inclusion and communication. Museums, libraries, community, cultural and leisure centers, popular universities and associations, virtual learning places constitute some of the places that provide continuing education, places where adults can engage in learning processes and attend educational programs.

The range of topics covered within non-formal NVAE is vast – all the social issues form its subject matter, including ageing, crime, environment, health, heritage, parenting and poverty as well as cultural matters (for example, arts, crafts, cuisine, dance, languages, literature, media, music, theatre) and political matters (for example, community development, current affairs, democratic participation, history, international relations, law).

Another concept that is being used for framing adult education in cultural organizations is socio-cultural animation, comprising a broad spectrum of cultural, leisure, educational and community-oriented activities intended to enhance personal development, social change or both with an emphasis on increasing people's welfare. The two main purposes for socio-cultural and educational activities for adults are the training of the person, the development of certain learning capacities, self-expression and knowledge in specific areas; and the promotion of both active and passive participation in art and culture through, for example, artistic activities, educational support of cultural leisure activities, and promotion of cultural events.



While the general definition of adult education in cultural organizations is a subject largely agreed upon, the educational approaches embraced and the concrete ways, means and techniques used by museums, libraries, and cultural and community centers represent the core of contemporary dialogues and debates among cultural professionals and adult educators, as well as a major field for exploration, creativity development and innovation.

IV.1.1 Educational Approaches in Cultural Organizations

Education in cultural organizations is going through a paradigm shift, as our society as a whole is facing a change in individual and social behaviors and relations. Concepts and debates are organized along the axis from **object** or **content-focused** education to **user or learner-focused** education; from an approach that considers knowledge and expertise to be “in here” and the audience - “out there”, to the perspective from which the expertise of cultural professionals is just a part of the wider expertise available at the level of the whole community, so the audience is at the same time “in here” and “out there”ⁱ.

Approaches based on **social constructivism** emphasize the importance of culture and context in understanding what occurs in society and in constructing knowledge based on this understandingⁱⁱ. In the learning process, both the context in which the learning occurs and the social context that learners bring to their learning environment are crucial elements. In this respect, there is a need for collaboration among learners, as well as between learners and their practitioners in society. Social constructivist approaches seem to be particularly suited for adult education, as it respects the main principles and assumptions about adult learners:

- Adult learners bring a great deal of experience to their learning environment. Educators can use this as a resource.
- Adults expect to have a high degree of influence on what they are to be educated for, and how they are to be educated.
- The active participation of learners should be encouraged in designing and implementing educational programs.
- Adults need to be able to see applications for new learning, and tend to be problem-centered.



- Adult learners expect to have a high degree of influence on how learning will be evaluated.
- Adults expect their responses to be acted upon when asked for feedback on the progress of the programⁱⁱⁱ.

Some recommendations and guidelines should be considered by adult educators and cultural organizations when designing and implementing educational programs and activities for adults, in order to create an inclusive learning curriculum:

- Individuals bring multiple perspectives to a learning situation as a result of their religion, gender, ethnicity, class, age, sexuality, and/or physical abilities. Build a curriculum that acknowledges these perspectives.
- Reflect the experiences of learners, both as individuals and as members of particular social groups. Value these experiences and use them as a basis for learning and assessment. They are powerful additions to the curriculum.
- Acknowledge the power disparity between adults and their instructor/trainer/facilitator. Create an environment that allows adults to disagree with their instructor. Do not require that adults agree with a particular viewpoint or 'fact'.
- Be aware that participants are positioned differently in their relationships to each other and to the knowledge that is being acquired. All learners do not bring with them the same ability to think critically, analyze results, etc. If you plan to require these skills, build an opportunity to integrate them into the course.
- Define and develop active learning activities, such as for example performing and/or documenting different tasks and experiments, taking a test for measuring abilities, interests or attitudes.
- Define and use strategies for allowing learner control, as for example: create peer learning groups, allow for a periodical review of the learning goals and objectives, encourage and support collaborative work for allowing adults to speak for themselves.

In the adult education field, there are an incredible number of variables: each adult is different, as are cognitive styles, learning styles, physiology, culture, and personality. However, if cultural organizations and adult education facilitators are prepared to listen to learners, they may find out what they need to know in order to become **learners-centered**.



IV.1.2 Education Methods Encouraging Active Learning and Social Constructivism

The following series of educational methods is not exhaustive; many others can be discovered consulting the theory and practice available in the adult education field. More importantly, every such method has a multitude of possible implementations and invites to be used with flexibility and creativity, not only as a method *per se*, but also in mixtures and combinations that hold the potential of real innovation. Methods that are encouraging adults to be active learners and to engage in educational processes which take into consideration their specific learning style and expectations as defined by their background in terms of age, race, gender, social and economic status, religious beliefs and sexual orientation: Structured Warm-Up Activities Method, Presentation Method, Reading Materials Method, Demonstrations Method, Video and Films Method, Note-Taking Method, Discussions Method, Questionnaires Method, Fishbowl Method, Case Studies Method, In-Basket and Card Sorts Method, Role Plays Method, Role Playing a Case Study Method, Games and Other Structured Activities Method, Scaffolding, Praxis, Group work and Dialogue method.

Researches and observations consistently confirmed that discovery, experiential and group-based learning are **the main learning models** used in non-formal education/learning; while metaphor, drama, play and reflection are the main carriers of training content and skills development.

The following pages present a selection of those methods that have the largest potential to help adult educators from cultural organizations to create engaging, entertaining, informing and informal educational programs for adults.

THE ROLE-PLAY METHOD

Method description

Role-play can be defined as a technique in which people are presented with a real or artificial context, experimenting states and circumstances similar to real ones. It involves two or more participants that are given roles to play, to enact, based on the information they receive: the role description, concerns, objectives, responsibilities, emotions, etc. of each



character and a general description of the situation, and the problem that each of them faces. The participants develop a strategy to react or think in a particular situation, and possible suggestive solutions to solve the problem or to analyze the situation. S/he also learns and forecasts on the reactions and possible behavior of the other participants in the context. Consequently, not only does this technique lead to self-learning about the expected outcome of a situation, but it also helps understanding the others' perception about the task or issue. Results are evaluated and discussed with participants at the end of the session.

Objectives of the Role play as a learning technique

- 1) It helps understanding how to handle a particular situation
- 2) It helps improving interpersonal relationship
- 3) It helps providing an insight to understanding others' behavioral patterns.
- 4) It helps anticipating the other party's reaction
- 5) It helps developing a better understanding of the issue, and conducts to a better decision-making
- 6) It helps developing a better understanding of the job
- 7) It helps developing communication, management development and leadership quality.

Features of the Role play as learning method

- a) **Learning by doing** – Since the participant plays a role within given circumstance, s/he practically learns and understands the demand or requirement of skills required to resolve or get the task done.
- b) **Learning through imitation** – while playing the new or the expected role, the participant gets the feelings about the other person and tries his/her best to include and accrue all traits of the given role. Thus, s/he gets an opportunity to understand, analyze and reflect on the other person's perception and behavior.
- c) **Learning through observation and feedback** – This method helps with dual learning. Not only does the trainee learn and reinforce the concepts by self-learning, but s/he also develops an understanding about a new role. This approach helps building a good decision-making ability, management capacity and leadership overall.
- d) **Learning through analysis and conceptualization** – The role played by the trainee helps analyzing the various skills involved in the



role as domain, conceptual, design or human skills are envisaged; thus, it helps designing a broader understanding of and a clear outlook on the task.

Examples of How the Method Can Be Used in Non Formal and Informal Contexts

Role-play as a method constitutes the basis for the development of many types of games, both in virtual reality and in real circumstances, and other structured activities:

- *Historical re-enactment* is a type of live-action role-play in which participants attempt to recreate some aspects of a historical event or period. The types of re-enactment include: *living history* that aims at portraying the lifestyle of a certain period; *combat demonstration* consists of demonstrations of basic tactics and maneuvering techniques; however, it is not based on a real battle, unlike *battle re-enactment*, which is a re-enactment of scripted battles, by imitation of the original course of action.

- *Psychodrama* is a learning technique that involves acting out of emotions and mental states, used in many contexts, but also in *Playback Theater* - a form of improvisational theater in which group members tell stories from their lives and watch them enacted on the spot.

- *Forum Theatre* is a type of theatre whose goals can be considered equally of an artistic and educational nature; it is being successfully used in approaching sensitive social and community issues; during the theatrical performance, actors or audience members could stop a performance, often a short scene in which a character was being oppressed, discriminated in some way. The audience would suggest different actions for the actors to carry out on-stage in an attempt to change the outcome of what they were seeing, stimulating in this way individual and group reflection on the issue being at stake.

- As a measure accompanying temporary or permanent exhibitions, museums can develop *role-play based scenarios for visitors*, inviting them to enact a specific character that has certain tasks to fulfill, following a predefined direction in the exhibition space.



SCAFFOLDING

Method Description

Scaffolding, a term taken from Applebee and Langer, implies empowering adults with their own authority. First, a task that they need to accomplish is identified; then, they are given a facilitator-determined scaffold or structure to follow in order to achieve the task. Once that task is achieved, the next task is set and scaffolded again. A new task is set. Using the previous scaffolds, adults can begin to learn on their own. As they become increasingly in control of their own learning, they can adapt the scaffolds to various situations.

The activities provided in scaffolding instruction are just a bit beyond the level of what the learner can do alone. The more capable other provides the scaffolds, so that the learner can accomplish (with assistance) the tasks that s/he or she could otherwise not complete.

Objectives of Scaffolding as a Training Technique

1. It provides clear direction and reduces adults' confusion – Educators anticipate problems that adults might encounter and then develop step-by-step instructions, which explain what a student must do in order to meet expectations.
2. It clarifies purpose – Scaffolding helps adults understand why they are doing the work and why it is important.
3. It keeps adults on task – By providing structure, the scaffolded lesson or research project provides pathways for learners. The learner can make decisions on which path to choose or what things to explore along the path, but they cannot wander off the path, which is the designated task.
4. It clarifies expectations and incorporates assessment and feedback – Expectations are clear from the beginning of the activity since examples of exemplary work, rubrics, and standards of excellence are shown to the adults.
5. It points adults to worthy sources – Educators provide sources to reduce confusion, frustration, and time. Adults may then decide which of these sources to use.
6. It reduces uncertainty, surprise, and disappointment – Educators test their lessons in order to determine any possible problem areas, and then refine the lesson to eliminate difficulties so that learning is maximized.



Features of Scaffolding as a Learning Method

Scaffolded instruction is also employed in problem-based learning environments. Problem-based learning (PBL) is an educational approach that challenges adults to "learn to learn", this aspect constituting one of the main benefits in using this method.

Examples of How the Method Can Be Used in Non-formal and Informal Contexts

Scaffolding functions very well in practice-oriented educational contexts; it aims at helping adults develop all types of skills – both of a practical and attitudinal nature.

- programs for teaching artistic skills and handicraft techniques can successfully use scaffolding, as it allows learners to gradually take control of their learning and development process.
- programs of personal development and self-improvement of the individual based on their learning processes, on this method or on its instances.

PRAXIS

Method Description

Praxis is a Greek word for defining action with reflection. The idea of doing while learning is a widely recommended approach to teaching adults as well as children, although the existence of some kind of participatory and collaborative element may be one of the most frequently cited differences between the education of children and the education of adults. Adults returning to the learning process want to see how theory relates to practical application, and one way to 'do' while learning is to set skills in the context of problem solving. Another way is to provide experiences for learners and allow them to construct their own knowledge.

The praxis model for adult education places lifelong learning and the adult learner in a societal context and recognizes that learners and knowledge are embedded in context. Praxis places attention on three essential tasks of the learner: consciousness, practice, and reflection on practice. The method can be used in two different manners: a reflexive and a non-reflexive one. The non-reflexive praxis is used to create a routine mechanism that is operating within the students' frame of mind. Used in a reflexive manner, the method aims at provoking participants



to unsettle their settled mindsets and to have a fresh look at the world around and to intervene. In this sense, praxis intervention method helps members struggling against structurally deep-rooted discriminations. Within the process of praxis intervention, adults would first listen to experts' opinions, explanations and demonstrations of the phenomenon under discussion or of the competence to be developed. In the next phase, they would carry out experiments and exercises relevant to the topic or to the domain, conducted individually, collectively and collaboratively, under the expert's guidance. The results of this phase should be discussed and clarified with each other and also with the expert.

Objectives of Praxis as a Training Technique

1. Help students gain a large quantity of quality knowledge within short periods of time.
2. Explore learners' potential to reflexively work on their respective mentalities and attitudes.
3. Produce within learners a moment of dialectic change, guiding them through an exploration process of ideas and beliefs with the tools of rationality.

Features of Praxis as a Learning Method

A specificity of the praxis method is that learners are gaining knowledge through a process of creative appropriation rather than indoctrination or authoritarian transmission.

Praxis can be successfully used both in the development of professional skills – from management to engineering and medicine – and for interventions at the group or community level, designed to act upon individuals' and groups' behaviors, attitudes and beliefs. The adult educator has, in this context, the role of a learning facilitator rather than that of a teacher or knowledge transmitter.

Examples of How Praxis Method Can Be Used in Non-formal and Informal Contexts

Beside its applicability for the development of professional skills, including for the training in technology – where students can be guided to further develop technology by experimenting with both users and



experts – praxis, as a reflexive method, can be successfully used to address problems raised by various social and cultural contexts.

- Working with marginalized people - people discriminated on the basis of gender, ethnic origins, and sexual orientation or religious practices or people at the risk of exclusion for economic and social reasons - and/or working on topics related to marginalization and discrimination. The praxis mode in these contexts must be sensitive towards the differences existing between participants in terms of their group and individual stories; also attention must be paid to the interaction settings, spatial positioning and all the elements that are creating the process framework. In this type of process, both adult participants and facilitators need to be self-reflexive and self-critical. Topics from this field can be successfully addressed by the use of artistic skills and practices, and/or the design of technology-based processes.

- One such example is Participatory Video, a praxis-type method comprising a set of techniques used to involve a group or a community in the design and creation of their own film. The method touches on both helping the group and the individuals tackle specific problems and on raising awareness and promoting an understanding of these problems within and also outside the group. The film, produced entirely by participants themselves with support only on the technical aspects of the manipulation of media tools, based on their own concept, will be used in a second phase as a pretext for discussions and debates, involving only the group or the public at large.

GROUPWORK

Method description

As an adult education method, group work involves the realization of structured tasks by a defined group. While the task is defined by the educator, and sometimes also by the individuals forming the group, the way in which the task is going to be accomplished is defined only in general terms by the trainer or left entirely at the choice of the group. Similarly, the definition of the task within the group is decided by the group itself, the trainer or adult educator pre-defining only the required or expected roles and results. The group has total control over group processes and interactions. Depending on the allocated resources, dimension and complexity level of the task, the educational processes



based on group work must take into consideration the principles of group formation, its stages (forming, storming, norming and performing) and their influence on the participants and on the learning process as a whole. The group work results are discussed by the adult educator with the whole group reunited from the group's perspective of group and not as individual contributions.

Objectives of the Group Work as a Training Technique

1. It provides adults with valuable information and competences acquired mainly through interaction and communication with their peers.
2. It helps developing a better communication and reciprocal knowledge by participants.
3. It creates group cohesion, as it orients all group efforts to the accomplishment of a common task.
4. It gives learners the possibility to confront, discuss and debate their perspectives on the subject/task under consideration.
5. It creates knowledge by discovering the individual resources that exist within the group, and by building on them.

Features of the Group Work as a Learning Method

One of the benefits of group work is an increased social integration. Social integration has been shown to have a significant positive effect on retention. Small groups of peers at the same level of career maturity create a social environment that motivates adult learners to persist. The importance of drawing on the experiences, skills, and values of the learners themselves is an internationally supported tenet of adult education. Groups allow adults to draw on these experiences. Groups and group work represent an especially important experience for minority adults since the latter must often work with people from the dominant culture when they begin their careers. Groups can give such adults valuable experiences and insights into this 'other' culture.

Examples of How Group Work Method Can Be Used in Non-formal and Informal Contexts

Group work can be used to educate in a large variety of domains and for very various subjects and competences. As research results point, the public of cultural institutions enjoys better the possibility to develop their relations with the organization as a part of a group process rather than on an individual basis. Cultural organizations should pay more attention to the creation of group activities and opportunities for group work in



their services for adults, defining activities and tasks to be followed and fulfilled not by individuals, but by groups (including competitions, quests, discovery games, etc.)

DIALOGUE

Method Description

Questions that allow adults to interpret and incorporate facts into their experiences are especially helpful to adult learners. However, dialogue can get out of hand unless ground rules are set. These ground rules might include topics such as: learners must raise their hand and wait or they can jump in, and there are times when dialogue will not be appropriate, etc. It is also important to solicit opposing viewpoints and to encourage participation.

Dialogue doesn't have to be confined to the classroom. The Internet offers wonderful opportunities for additional dialogue. The Internet allows us to extend cooperative problem solving outside the immediate community of learners and into a multicultural community. The constructivist view stresses communication among adults and between adults and the facilitator. Four kinds of communication and dialogue environments can be distinguished:

- discussion (in person or via email)
- argumentation (making a case for a particular viewpoint)
- inquiry teaching (student-constructed response to an instructor-posed question)
- brainstorming (generating ideas without attempting to criticize them)

Ideally, during a learning process, the educator uses different types of communication within a classroom.

Examples of How Communication and Dialogue Methods Can Be Used in Non-formal and Informal Contexts

One approach developed on the basis of methods like communication and dialogue is the one of Paulo Freire, called Concencitization. The focus of this method is to raise the consciousness of the learner, who begins to question and inquire a certain context or problem through dialogue, self-awareness and communication with the facilitator and with the other participants. Applied in literacy programs, the concencitization method has four stages, the first consisting in the identification by the



adult educator of those factors that act as limitations for the adults' literacy skills and capacities, as well as of those elements that can constitute “generative themes” for the group. The adult educator selects contradictory elements of the context, defines a thematic content for those elements and uses such elements in the next stage, where learners, through reflection and dialogue, are helped to perceive their own role in the contradiction. In the last stage, themes are converted into teaching/learning strategies, adapted to the learners' needs. The entire process is conducted through dialogue and communication between adult educator and learners, as well as among learners themselves.

The so-called Living library, a kind of educational activity using testimonials of people about their experiences, living and learning conditions, represents another example of the use of dialogue and communication. This approach developed on the basis of the more known and used method of the invited-expert, an individual with a special competence who is called to freely enter a dialogue with learners, responding in this way to their specific needs for information. The innovative character of the *living library* method is that the application field is moved to tackle social and cultural problems, considering as experts the very people who are dealing with those problems: immigrants, people with social, physical or mental disabilities, people having faced discrimination or difficult circumstances, etc.



IV.2. Educational Approaches

This section presents four educational approaches, relevant for adult learning in both formal and non-formal contexts. Its purpose is to enable trainers, adult educators and cultural professionals to understand the way in which different approaches impact on adult learners and how can they be used in the adults' best interest. The four approaches included in this material are rather complementary than opposite and can be successfully combined.

- Cooperative Learning
- Discovery-Based Learning
- Problem-Based Learning
- Active Learning

IV.2.1 Cooperative Learning

There are six key components of the Structural Approach to Cooperative Learning to be explored in the next pages:

- (1) structures and related constructs;
- (2) basic principles;
- (3) teambuilding and classbuilding;
- (4) teams;
- (5) management; and
- (6) social skills.

The final section of the chapter examines the benefits of the structural approach for learners, teachers/trainers, and the research community.

KEY 1: STRUCTURES AND RELATED CONSTRUCTS

Elements of Structures

Elements are the most basic unit of group behavior. In a familiar group scenario, the teacher has given a writing assignment and learners are writing independently. This is an element. When we analyze this element, we find that there are actors (individual learners) performing some kind of action (writing). The name of any element tells who the



actors are and what they are doing. Thus, the element in our scenario is called "Individuals Write."

In another scenario, the teacher asks a question, and learners are asked to think about how they would answer. As the talking stops, the actors are individuals, and the action is thinking. This element is "Individuals Think." Of course, there is more to group behavior than just independent actors performing independent actions. The group is replete with interactions, especially the cooperative group. A typical group interaction occurs when a teacher instructs the class. Once again, there is an actor (teacher) and an action (instruction), but now there are also recipients (the class). Thus, an element can have three components: actors, actions, and recipients. The name of the element in our last example reflects all three components: "Teacher Instructs Class."

In a cooperative learning group with eight teams, if the instructor wanted each learner in each team to know all of what his or her fellow teammates did, a single "Individuals Interview Partners" would not work. A single element cannot accomplish the teacher's goal. Each element has its domain of usefulness, and the elements are selected according to which would be most appropriate for a desired objective. In this case, where the desired result is beyond the domain of a single element, a combination of elements is used to accomplish the objective. Elements may be combined to form structures.

Structures

Elements in the group have certain qualities or characteristics of their own. Depending on how they are combined, group elements can complement each other and can take on an entirely new life. Single elements used alone are limited in their domain of usefulness. In conjunction with other elements, however, they can become powerful structures that may be used in a variety of group situations.

Returning now to the example of the instructor whose objective cannot be accomplished by a single element, we see the strength of structures. As you recall, the instructor's objective was to make sure that everyone on each team knew what each team member did over the summer vacation. The instructor simply could have the teammates in each team discuss what they did, that is, he could use the structure Team Discussion. However, since this instructor is fluent in the structural approach, s/he knows that each structure has its domain of usefulness, and that Team Discussion is not the best structure for the job. S/he



knows that there are many structures to choose from, and for his/her objective a Three-Step Interview would work better than a Team Discussion. Let us examine why did this instructor choose a Three-Step Interview over a Team Discussion (Table 1.1).

Table 1.1 Team Discussion versus Three-Step Interview

Structure	Elements	Characteristics
Team Discussion	<ol style="list-style-type: none"> 1. <i>Teacher Instructs Class</i> 2. <i>Teams Discuss</i> 	Unequal participation Not all participate No individual accountability 1/4 of class talking at a time Off-task talk
Three-Step Interview	<ol style="list-style-type: none"> 1. <i>Individuals Interview Partners</i> 2. <i>Individuals Interview Partners</i> (Learners reverse roles.) 3. <i>Individuals Share with Teammates</i> (Each learner in turn shares what their partner told them, a Roundrobin.) 	Equal participation All participate Individual accountability 1/2 of class talking at a time

A Three-Step Interview is a structure composed of three elements:

- (1) Individuals Interview Partners: learners split into two pairs within a team of four, and there is one interviewer and one interviewee in each pair;
- (2) Individuals Interview Partners: the same as the first element, but the interviewee and interviewer in each pair switch roles;
- (3) a Roundrobin: each team member shares with teammates something s/he learned from his/her partner. In this case, the learner would share what his/her partner did over the summer vacation.

Technically speaking, a Roundrobin is a structure consisting of four elements: Individuals Share with Teammates, repeated four times--once for each teammate in turn. The structure Team Discussion is composed of two simple elements:

- (1) Teacher Instructs Class: the teacher tells the class what they are to discuss in teams, and
- (2) Teams Discuss: teams discuss the topic. In the example, teams discuss what they did over the summer.



The most important considerations when determining the domain of usefulness of a structure are the following:

1. What kind of cognitive development does it foster?
2. What kind of social development does it foster?
3. Where does it best fit in a lesson plan?
4. What kind of curriculum does it deliver?

Modifying and Creating Structures

Structures can be tailor-made to meet desired social, cognitive, and academic objectives. Existing structures can be modified to fit the context in which they are being used. Modifying structures is based on understanding elements.

Activities

An activity is merely a structure plus content, or sometimes just an element plus content. Returning to our example of the teacher who had each learner interview one other learner regarding what they did over the summer, we have an example of an element-based activity. The element was Individuals Interview Partners. The content was summer vacation. An activity is created when content is combined with an element. If the content or the element is changed, the activity changes. For example, if learners were asked to interview each other on their approach to a math problem, a very different activity would have resulted. Similarly, if we keep the content constant, say math problem solving, and we change the element from Individuals Interview Partners to Individuals Write, a very different activity results. Each time we change either the element or the content, a new activity results, with a different learning potential.

A structure plus content is a structure-based activity. If the teacher chooses to use a Three-Step Interview on the content summer vacation, we have an example of a structure-based activity. As with element-based activities, when we change the content of a structure-based activity, we change the activity. A Three-Step Interview on the meaning of a poem is a very different activity than a Three-Step Interview on career aspirations (Figure 2.2).



Table 2.2 Overview of Selected Structures

Structure	Brief Description	Functions Academic & Social
Roundrobin	Teambuilding Each learner in turn shares something with his/her teammates.	Expressing & opinions. Creation of stories. <i>Equal Participation: Getting acquainted with team-mates.</i>
Three-Step Interview	Learners interview each other in pairs, first one way, then the other. Each learner shares with the group the information they learned in the interview.	Sharing personal information such as hypothesis, reactions to a poem, conclusions, forms a unit. <i>Participation. Listening.</i>
Corners	Classbuilding Each learner moves to a corner of the room representing a teacher-determined alternative. Learners discuss within corners, then listen to and paraphrase ideas from other corners.	Seeing alternatives, hypotheses, values, problem-solving approaches. <i>Knowing and respecting different point of views; meeting classmates.</i>
Match Mine	Communication Building Learners attempt to match the arrangement of objects on another learner's grid using oral communication only.	Vocabulary development. <i>Communication skills, Role-taking ability.</i>
Numbered Heads Together	Mastery: Practice & Review The teacher asks a question, learners consult to make sure everyone knows the answer, then one learner is called upon to answer.	Review. Checking for Comprehension. Knowledge. <i>Comprehension. Tutoring.</i>
Inside-Outside Circle	Learners stand in pairs in two concentric circles. The inside circle faces out, the outside circle faces in. Learners use flash cards or respond to the teacher's question as they rotate to each new partner.	Checking for understanding. Review. Processing. Helping: <i>Tutoring, Sharing, Meeting Class-mates.</i>
Pairs Check	Learners work in pairs within groups of four. Within pairs, learners alternate -- one solves a problem while the other coaches. After two problems, the pair checks to see if they have the same answers as the other pair.	Practicing skills. <i>Helping Praising.</i>
Think-Pair-Share	Concept Development Learners think to themselves on a topic provided by the teacher; they pair up with other learners to discuss it. They then share with the class their thoughts.	Generating and revising hypotheses; inductive reasoning, deductive reasoning, application. <i>Participation, involvement.</i>



Structure	Brief Description	Functions Academic & Social
Team Word-Webbing	Learners write simultaneously on a piece of chart paper, drawing main concepts, supporting elements and bridges representing the relation of ideas in connection with a concept.	Analysis of concepts into components; understanding multiple relations among ideas: differentiating concepts. Role-taking.
Roundtable	Info Exchange: Within Teams Each learner in turn writes one answer as a paper and pencil are passed around the group. With Simultaneous Roundtable, more than one paper is used at once.	Assessing prior knowledge, practicing skills, recalling information, creating cooperative art. Teambuilding: Participation of all.
Blackboard Share	Info Exchange Between Teams A learner from each team goes to the board and writes an opinion, solves a problem, or shares other information. Usually, there is a predetermined place on the board for each team to record its answer.	Sharing information, contrasting divergent opinions or problem solving strategies. <i>Classbuilding: Participation of eight times as many as the traditional class.</i>

Lessons

Returning for the last time to the example of the learners using the structure Three-Step Interview to find out what teammates did over the summer vacation, let us examine the relationship of activities to lessons. The interview activity (structure = Three-Step Interview; content = summer vacation) was one part of a lesson. In fact, the activity was used to create an anticipatory set for a creative writing lesson "My Summer Vacation." The activity engaged the learners in discussing the summer vacation and aroused their interest. The activity (Three-Step Interview on summer vacation), though, is but one of a number of activities in the writing lesson.

A lesson is a set of activities sequenced to reach certain learning objectives. Activities are the building blocks of lessons. Cooperative learning lessons in the structural approach describe the structure and the content of each step of a lesson.

Lesson Designs

Teaching/training is the art of efficiently reaching learning objectives. The structural approach to cooperative learning is aimed at providing educators with tools to efficiently reach a range of learning objectives. Elements or structures are selected to deliver content. There are a



number of established structures that may be used, and there is also the potential to play with elements to modify and create new structures. Structures and elements, when combined with content, are called activities. Activities are sequenced to form lessons. Lesson designs are sequenced sets of design elements or lesson objectives that serve to guide the direction of the activity. There are a variety of prefabricated lesson designs, each designed to achieve different learning objectives. Also, by playing with the elements of lesson design, an educator may alter the lesson's design to better reach specific learning objectives.

Table 3.3 Overview of Selected Lesson Designs

Lesson Design	Brief Description	Functions Academic & Social
Color-Coded Co-op Cards	Mastery Learners memorize facts using a flashed game. The game is structured so that there is a maximum probability of success at each step, moving from short-term to long-term memory. Scoring is based on improvement.	Memorizing facts. <i>Helping Praising.</i>
Co-op Co-op	Project Learners work in groups to produce a unique product to share with the whole class; each learner has a unique contribution to the group.	Learning and sharing complex material, often with multiple sources. Evaluation. Application. Analysis. Synthesis. <i>Conflict Resolution. Presentation skills.</i>
Jigsaw	Labor Division Each learner on the team becomes an "expert" on one topic by working with members from other teams who were assigned the corresponding expert topic. Upon returning to their teams, each one in turn teaches the group and learners are all assessed on all aspects of the topic.	Acquisition and presentation of new material. Review. Informed Debate. <i>Interdependence, Status equalization.</i>
Partners	Learners work in pairs to create or master content. They consult with partners from other teams. They then share their products or understanding with the other partner pair in their team.	Mastery and presentation of new material; concept development. <i>Presentation and communication skills.</i>



KEY 2: THE BASIC PRINCIPLES

Simultaneous Interaction

Interaction within a group may occur simultaneously or sequentially. Sequential interaction occurs when learners participate one at a time in a sequence, taking turns. If one person at a time is called upon to share an idea, the interaction is sequential. Sequential interaction is limiting and inefficient to a certain extent: to give each learner in the class one minute to share ideas using a one-at-a-time structure takes about thirty minutes.

Simultaneous interaction occurs in a group when there is more than one active participant at a time. Simultaneous interaction is usually preferable to sequential interaction because it increases the number of learners actively involved at any one moment and, thus, the amount of active participation time per learner. To give each learner one minute to share if learners are taking turns talking in pairs takes only two minutes. Elements that include pair work are simultaneous elements because the action is taking place simultaneously in many places all at the same time.

Let us look at a discussion. When we have some issue to be discussed in the group, we have alternatives as to how it may be discussed. We can use the element Class Discusses, Teams Discuss, or Pairs Discuss. If active participation is our primary objective, applying the simultaneity principle, we would choose a Teams Discuss over a Class Discusses and a Pairs Discuss over a Teams Discuss. In Class Discusses, there is one person speaking at a time; in Teams Discuss, on the average, one person in each team is talking at any one moment, so one-quarter of the class is talking at a time; and in Pairs Discuss, half the class is actively expressing ideas at any one moment.

What about presentations? If teams have prepared presentations, and it is time for them to share with the class, what element would we use? We could use Team Presents to the Class. If the presentation was five minutes long, and it took about a minute for transitions, eight team presentations to the class would take forty-eight minutes. Applying the simultaneity principle, we instead choose Teams Present to Teams. If every team makes its five-minute presentation to another team, a minute is taken for transition, and then the presenting team becomes the receiving team, in eleven minutes every team has given and received a presentation. This leaves time for teams to reflect, discuss their presentations, and fine-tune them. Then, they can try them again



with another team as a new audience. By applying the simultaneity principle, twice as much can be accomplished in less than half the time.

Equal Participation

Simultaneous interaction does quite well to get learners actively involved. When we do Teams Discuss rather than Class Discusses, one in four learners is speaking rather than one in about thirty-two. But if we look closely at what is happening in our team discussion, we may find that one outspoken learner is doing all the talking while his/her teammates are doing all the listening. This is not equal participation. To make sure that everyone has an equal chance to speak, we might choose to do a series of four Individuals Share with Teammates (a Roundrobin) rather than Teams Discuss. Now, every learner has an equal role in sharing information.

What would we do if we wanted to have our class read a short story? We know that when we have learners read in teams, there will be more active reading and listening than if one individual or the teacher reads to the class. So we choose Individuals Read to Teammates. But if we just tell a team to read the short story, we will probably find that once again one learner decides to do all the reading while his/her teammates do all the listening. If we make it clear that, after each minute, teammates are to rotate the role of reader (a Roundrobin), every learner will have an approximately equal participation.

Similarly, during a pair discussion focused on recalling the major events of a story, one learner may do all the talking. To equalize participation, we may do a series of Individuals Share with Partner (a Rallyrobin), having learners alternate, each in his/her turn describing one event. As a general rule, we want to make sure that our learners have a roughly equal participation, so when we are selecting, modifying, or creating structures, we must make sure to select elements in which all learners are doing the same thing, or elements that ensure that each learner gets his or her turn.

Positive Interdependence

Positive interdependence is the most basic principle in cooperative learning. Positive interdependence is created whenever a gain for one means a gain for another. Two individuals are mutually positively interdependent if the gains of either one of them help the other one. Two powerful forces are released when we make learners positively interdependent academically: If any learner needs help, s/he finds



willing tutors among his teammates or classmates (a gain for one is a gain for the other), and learners are encouraged by their teammates and classmates to do their very best, raising motivation.

Positive interdependence is created within structures in various ways – usually not by the inclusion of one element, but rather by a sequence of elements. For example, let us look at a Three-Step Interview. In the first two steps, teammates are organized in pairs, interviewing each other both ways. In the third step, learners tell their teammates what they learned from their partner in the interview. Teammates have no other way of obtaining information, so they are dependent on the interviewing, listening, and speaking skills of their teammate. In this way, this third step creates a positive interdependence; the better each learner is at interviewing, listening, and sharing, the more each will learn. A gain for one is a gain for the others.

Positive interdependence increases learning as well as closeness among teammates. They all feel that they are on the same side, tutoring and encouraging each other. Almost all well-established structures have a built-in positive interdependence.

Individual Accountability

Individual accountability is making each member accountable for his or her own learning or contribution. For example, in Numbered Heads Together, each learner is held accountable to the teacher and classmates for sharing an answer or idea. The element that holds learners accountable here is the last step of Numbered Heads Together: Individual Shares with Class. When it is made clear to learners that they are being held accountable, it increases the likelihood that they will listen and participate. If, for instance, Numbered Heads Together was modified to exclude the element Individual Shares with Class, learners would know that they were not accountable for sharing an answer, and some might decide to not pay attention at all.

KEY 3: TEAMBUILDING AND CLASSBUILDING

What appears like a time off-task can be viewed as a very important investment in creating the social context necessary for teams to maximize their potential. Again and again, we have observed greater a long-run efficiency, learning, and liking of class, school, and subject matter if teachers take time for teambuilding and classbuilding. When there is a positive team identity, liking, respect, and trust among team



members and classmates, there is a context within which maximum learning can occur.

When teambuilding and classbuilding are neglected, especially in groups in which there are preexisting tensions, teams experience serious difficulties. Kagan (1992) distinguished five aims of teambuilding and classbuilding and provided appropriate structures for each of them. The five aims of teambuilding are (1) getting acquainted, (2) team identity, (3) mutual support, (4) valuing differences, and (5) developing synergy.

If the cooperative learning lesson is simple and fun, as with the Flashcard Game or Numbered Heads Together, usually little or no teambuilding is necessary. If, on the other hand, the lesson involves activities in which conflicts might arise (choosing a topic or format for a project), it is important that a strong positive team identity be developed prior to the lesson.

Classbuilding provides networking among all of the learners in a class and creates a positive context within which teams can learn. Although learners spend most of their time in teams, in the cooperative group, it is important that learners see themselves as part of a larger supportive group—the class—not just as members of one small team.

KEY 4: TEAMS

A cooperative learning team has a strong, positive team identity, ideally consists of four members, and endures over time. Teammates know and accept each other and provide mutual support. Ability to establish a variety of types of cooperative learning teams is a key competency of a cooperative learning teacher. "Teams" may be contrasted with "groups," which do not necessarily endure over time or have an identity. Kagan (1992) distinguished four major types of cooperative learning teams and assorted methods to produce them. The four most common cooperative arrangements are (1) heterogeneous teams, (2) random groups, (3) interest teams, and (4) homogeneous language teams. Each of these types of teams is useful for different purposes.

The most common cooperative learning-team-formation methods assign learners to maximize heterogeneity. The heterogeneous team is a mirror of the group, including, to the extent possible, high, middle, and low achievers, boys and girls, and an ethnic and linguistic diversity. Heterogeneity of achievement levels maximizes positive peer tutoring and serves as an aid to group management.



If we always use heterogeneous teams, however, the high achievers would never interact (missing important academic stimulation), and the low achievers would never be on the same team (missing leadership opportunities). Thus, there is a need for additional team-formation methods. Non-heterogeneous teams can be formed in a variety of ways, including self-selection (allowing learners to group themselves by friendships or interests) or random selection (learners draw a number from one to eight for team assignments). Self-selection runs a strong risk of promoting or reinforcing status hierarchies in the group ("in-" and "out-groups"); random selection runs the risk of the creation of "loser" teams (the four lowest achievers in the group may end up on the same team if the choice is left to the luck of the draw). There are important benefits, however, deriving from the occasional use of random, interest, or homogeneous language teams. In the structural approach, teachers are encouraged to learn the domain of usefulness of a range of team-formation methods, and to choose the method that is most appropriate for the objectives at hand.

How big should teams be? Teams of four are ideal. They allow pair work, which doubles participation and opens twice as many lines of communication as compared to teams of three. Teams larger than four often do not lead to enough participation and are harder to manage. Much of the rationale for cooperative learning is based on the benefits of active participation. As the group size is made smaller, active participation increases. As learners share in a group of eight, one-eighth of the class is an active participant at any one time. Groups of four allow one-fourth of the class to produce language at any one time--from the perspective of active participation, they are twice as good as groups of eight. Given this rationale, why not move to groups of three or even to pairs? There are three reasons why teams of four are most effective. (1) Pair work doubles the amount of participation. With groups of three, there is an odd person out with pair work. Pairs Check, Paired Reading, and the Flashcard Game are among the structures that maximize simultaneous interaction through pair work. (2) The social psychology of a group of three is often a pair and an outsider. Two people hit it off well and talk to each other often, leaving one left out. (3) As compared to a group of three, a group of four doubles the probability of an optimum cognitive and linguistic mismatch. The research on moral development and on linguistic development indicates that we learn well from someone only somewhat different from our own level of development--someone who will provide stimulation in our zone of proximal



development. In a group of three, there are three possible pairs; in a group of four, there are six.

KEY 5: MANAGEMENT

Many teachers report that their management problems decrease dramatically once they switch to cooperative learning. The reason is that in the traditional group, there is a mismatch between learners' needs and the group's structure. The nature of a learner is active and interactive: Learners want to "do" and to talk. The traditional classroom demands that learners be passive and isolated. Naturally, learners do not give up their basic needs without a struggle, so a great deal of energy is spent to keep learners in their seats, "not bothering their neighbors," and quiet. By contrast, the cooperative classroom is better aligned to learners' needs. It is based on the assumption that learning occurs by means of doing and interacting. Learners are encouraged to interact, move, create, and do. Feeling their basic needs met, learners are no longer "management problems."

Nevertheless, there are a number of management skills necessary in the cooperative classroom, which skills are not involved in managing a traditional classroom. The management of a cooperative classroom is radically different from the management of a traditional classroom. In the traditional classroom, managing learner behavior means instituting a system to keep learners from talking or interacting. By contrast, in the cooperative classroom, learner-learner interaction is encouraged, and therefore management involves different skills. Some of the management concerns introduced along with the introduction of teams include seating arrangement, noise level, giving directions, distribution and storage of team materials, and methods of shaping the groups' behavior.

The instructor establishes a quiet signal that quickly focuses at any time all attention away from peer interaction and toward the instructor. Extensive use of teacher and learner modeling is an efficient cooperative management technique, as is extensive use of structuring. Efficient methods of distributing materials are established, for example, a materials monitor for each team. The room is arranged so that each learner has an equal and easy access to each teammate (ideally, each learner on a team can easily put both hands on a common piece of paper), and all learners are able to easily and comfortably orient forward toward the teacher and blackboard (Kagan, 1992).



KEY 6: SOCIAL SKILLS

Research reveals that with no social skills instruction at all, learners in cooperative teams become more caring, helpful, and understanding of each other. Nevertheless, if we really wish to deliver a differentiated social skills curriculum and to have our teams and groups run as efficiently as possible, we cannot depend entirely on the natural acquisition of social skills. Educators can structure learning so that learners acquire social skills while they are doing math or science or social studies.

The Structured Natural Approach for social skills acquisition uses four tools: (1) roles and gambits, (2) modeling and reinforcement, (3) structures and structuring, and (4) reflection and planning time. Most important, these four tools are used in an integrated way to structure for the acquisition of one "skill-of-the-week." As learners interact in their cooperative groups, they become skillful in listening, paraphrasing, taking the other's role, managing group processes, and dealing with the dominant, shy, hostile, and withdrawn group members. They acquire skills, not just learn about them.

Cooperative efforts result in participants striving for the mutual benefit so that all group members:

- gain from each other's efforts. (Your success benefits me and my success benefits you.)
- recognize that all group members share a common fate. (We all sink or swim together here.)
- know that one's performance is mutually caused by oneself and one's team members. (We cannot do it without you.)
- feel proud and jointly celebrate when a group member is recognized for achievement. (We all congratulate you on your accomplishment!).

Why Use Cooperative Learning?

Research has shown that cooperative learning techniques:

- promote learning and academic achievement
- increase retention
- enhance satisfaction with the learning experience
- help develop skills in oral communication
- develop social skills



- promote self-esteem
- help promoting positive race relations.

Five Elements of Cooperative Learning

It is only under certain conditions that cooperative efforts may be expected to be more productive than competitive and individualistic efforts. Those conditions are:

1. Positive Interdependence (sink or swim together)

- The efforts of each group member are required and indispensable for the group's success
- Each group member has a unique contribution to make to the joint effort because of his or her resources and/or role and task responsibilities.

2. Face-to-Face Interaction (promote each other's success)

- Orally explaining how to solve problems
- Teaching/passing one's knowledge to another
- Checking for understanding
- Discussing concepts that are being learned
- Connecting present with past learning

3. Individual & Group Accountability

- Keeping the group size small. The smaller is the group size, the greater the individual accountability may be.
- Giving an individual test to each learner.
- Randomly examining learners orally by calling on one learner to present his or her group's work to the teacher (in the group's presence) or to the entire class.
- Observing each group and recording the frequency with which each member contributes to the group work.
- Assigning the checker role to one learner in each group. The checker asks other group members to explain the reasoning and rationale underlying group answers.
- Having learners teach what they learned to someone else.

4. Interpersonal & Small-Group Skills

- Social skills must be taught:
 - Leadership
 - Decision-making



- Trust-building
- Communication
- Conflict-management skills

5. Group Processing

- Group members discuss how well they are achieving their goals and maintaining effective working relationships
- Describe which member actions are helpful and not helpful
- Make decisions about which behaviors to continue or change

IV.2.2 Discovery Learning

Discovery Learning is a method of inquiry-based instruction and is considered a constructivism-based approach to education. It is supported by the work of the learning theorists and psychologists Jean Piaget, Jerome Bruner, and Seymour Papert. Although this form of instruction has great popularity, there is considerable debate in the literature concerning its efficacy (Mayer, 2004). The mantra of this philosophical movement suggests that we should 'learn by doing'.

Discovery learning takes place in problem-solving situations where the learner draws on his own experience and prior knowledge and is a method of instruction through which learners interact with their environment by exploring and manipulating objects, wrestling with questions and controversies, or performing experiments.

Proponents of this theory believe that discovery learning has many advantages, including:

- encouraging active engagement
- promoting motivation
- promoting autonomy, responsibility, independence
- developing creativity and problem-solving skills.
- a tailored learning experience

Critics have sometimes cited disadvantages including:

- creating a cognitive overload
- potential misconceptions
- teachers may fail to detect problems and misconceptions



Principle 1: Learning needs to match the way in which the brain works

Effective learning includes the logical, linear thinking of the left brain and the creative, global thinking of the right brain. The brain processes many things simultaneously, not one thing at a time. Effective learning therefore engages learners on many levels at once. Effective learning has an emotional content and is stress-free. Loads of ideas are actually demonstrated to assist our own learning: “I really didn’t notice how much I was learning till afterwards.”

Principle 2: Learning needs to be presented in a variety of ways

We each have distinct preferences for receiving information and a range of eight intelligences for processing it. A rich assortment of learning options means that each learner can benefit to the fullest from the teaching.

Principle 3: Successful learning applies the principles of memory

Multi-sensory learning is highly memorable. Pictures and images are far easier to recall than words, especially if they are colored.

We remember that which is unique and different and easily forget the dull and boring. We recall through association and remember things in groups and families.

Short sessions of 15–20 minutes are more memorable, and information reviewed at certain critical times goes into the long-term memory.

Principle 4: Successful learning is an active experience totally involving the learner

Learning is actively created by the learners for themselves - it is not the passive absorption of someone else’s learning. True learning is a whole-body, whole-mind experience and involves the learner mentally, emotionally and physically. Learning comes from doing something, in context, and receiving feedback. Learners learn from what they do, not from what the teacher does.

Principle 5: Learners learn what they want to learn

Without a personal learning goal there is no learning. Learners need to know what’s in it for them and how the learning will benefit them both personally and professionally.



Principle 6: Learning thrives in a positive physical and emotional climate

A relaxing, stimulating environment that feels safe for the learner is essential. Learning is dependent on positive expectations of success and a healthy level of self-esteem. Laughter and enjoyment are number-one prerequisites for a successful learning!

Principle 7: Learning is a social experience

Collaboration accelerates learning while competition impedes it. Bringing learners out of isolation and into a learning community reduces stress and increases learning. The best learning often takes place in the interaction between the learners. Successful teachers and trainers are more concerned with building positive, caring relationships with learners than they are with using any new tip, tool or technique.

DISCOVERY LEARNING TECHNIQUES

When we build a discovery learning-based program, we choose design techniques that work best to meet specific learning objectives, content and facilitation requirements. These may be...

Stories

"You've just bought a company!" "The CEO has just formed a project team and you're on it." Whatever the story is, learners get "hooked" right from the start. Stories also help the learning "stick" over time.

Engaging Visuals

Large, full-color Discovery Maps, game boards or wall visuals intrigue learners, make them want to learn, and provide graphically interesting clues and metaphors that help speed discovery.

Small-Team Activities

A table team environment gives people a "we're in this together" sense of commitment to the learning and encourages active participation. A natural environment for team building is created, providing an added benefit to our learning designs.

Simulated Situations

Simulations replicate a slice of "reality" from the workplace or from a certain situation. They are time compressed and "safe" so that learners can make mistakes and learn from them without real-world consequences.



Maps and Models

Maps and models used in our programs help imprint critical content information during the learning experience and provide a take away reinforcement tool for ongoing retention.

Gaming Techniques

Chips, cards, game pieces, dice, timers and more. There's nothing like a little fun and competition to keep people focused on learning!

The great news is that discovery learning techniques appeal to all generational learning styles — from traditionalists to baby boomers to Generation X and Y'ers, to millennials.

IV.2.3 Problem-Based Learning

Problem-based learning approaches to education often generate a justifiable enthusiasm among the educators of adults who have become frustrated with the limitations of traditional lecture-based education. However, educators contemplating a change to a problem-based format rarely anticipate the many practical difficulties that can destroy one's enthusiasm and create chaos in the group. This case study, about the trials and tribulations of a fictional anthropology professor's, attempts to alert faculty students who are interested in trying the method to some of the unexpected challenges they might encounter.

What is Problem-Based Learning?

However, an essential component of problem-based learning is that content is introduced in the context of complex real-world problems. In other words, the problem comes first (Boud, 1985; Boud and Feletti, 1991; Woods, 1985). This contrasts with prevalent teaching strategies where the concepts, presented in a lecture format, precede "end-of-the-chapter" problems. In problem-based learning, learners working in small groups must identify what they know, and more importantly, what they don't know and must learn (learning issues) to solve a problem. These are the prerequisites for understanding the problem and making the decisions required by the problem. The problems' nature precludes simple answers. Learners must go beyond their textbooks to pursue knowledge from other resources in-between their group meetings. The primary role of the instructor is to facilitate the group process and



learning, not to provide easy answers. With the change in format come different forms of assessment such as group examinations.

IV.2.4 Active learning

Active learning is an umbrella term that refers to several models of instruction that focus the responsibility of learning on learners. Bonwell and Eison (1991) popularized this approach to instruction. This "buzz word" of the 1980s became their 1990s report to the Association for the Study of Higher Education (ASHE). In this report they discuss a variety of methodologies for promoting "active learning." However, according to Mayer (2004), strategies like "active learning" developed out of the work of an earlier group of theorists -- those promoting discovery learning. Practice after initial learning is of vital importance in one's education/career, and is important for cognitive development, but is practice required during learning?

It has been suggested that learners who actively engage with the material are more likely to recall information (Bruner, 1961), but several well known authors have argued this claim is not well supported by the literature (Anderson Reder, & Simon, 1998; Gagné, 1966; Mayer, 2004; Kirschner, Sweller, and Clark, 2006).^[1] Rather than being behaviorally active during learning, Mayer (2004) suggests learners should be cognitively active.

Active learning exercises

Bonwell and Eison (1991) suggested learners work in pairs, discuss materials while *role-playing*, *debate*, *engage in case study*, *take part in cooperative learning*, or produce short written exercises, etc. The argument is when active learning exercises should be used during instruction. While it makes some sense to use these techniques as a "follow-up" exercise or as an application of known principles, it may not make sense to use them to introduce material. Proponents argue that these exercises may be used to create a context of material, but this context may be confusing to those with no prior knowledge. The degree of instructor guidance learners need while being "active" may vary according to the task and its place in a teaching unit.

Examples of "active learning" activities include:

- A **class discussion** may be held in person or in an online environment. This environment allows for instructor guidance.



- A **think-pair-share** activity is when learners take a minute to ponder the previous lesson, later to discuss it with one or more of their peers, finally to share it with the class as **part** of a formal discussion. It is during this formal discussion that the instructor should clarify misconceptions. However, learners need a background in the subject matter to converse in a meaningful way. Therefore a "think pair share" exercise is useful in situations where learners can identify and relate what they know to others.

- A **short written exercise** that is often used is the "one minute paper." This is a good way to review materials.

While practice is useful to reinforce learning, problem solving is not always suggested. Sweller (1988) suggests solving problems can even have a negative influence on learning; instead, he suggests that learners should study worked-examples, because this is a more efficient method of schema acquisition. So, instructors are cautioned to give learners some basic or initial instruction first, perhaps to be followed up with an activity based upon the above methods.

Active Learning Method: Learning by Teaching

An efficient instructional strategy that mixes guidance with active learning is "Learning by teaching" (Martin 1985, Martin/Oebel 2007). This strategy allows learners to teach the new content to each other. Of course, they must be accurately guided by instructors. This methodology was introduced during the early 1980s, especially in Germany, and it is now well established at all the levels of the German educational system. "Learning by teaching" is the integration of behaviorism and cognitivism, and provides a coherent framework for theory and practice.



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ⁱⁱ Apud Beaumie Kim, *Social Constructivism*

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