

INCREASING PARTICIPATION IN ADULT EDUCATION:  
THEORY AND APPLICATION

by

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### ABSTRACT

As one method of facilitating attempts to increase participation in adult education, this study developed a theoretical framework, derived from theories of curriculum implementation. The study makes the case that the adult education literature does not provide a comprehensive theory for guiding attempts to increase participation. Rather, it says, the literature approaches the problem from one dimension at a time, either by characterizing the participants in terms of demographic variables, motivation orientations, and deterrent factors; manipulating material conditions to improve access to institutions; or considering the problem to be a marketing issue. There is no framework for approaching participation as a multidimensional problem.

The problem of lack of participation in new or innovative programs in adult education is seen in this study as analogous to one experienced in public schooling, namely lack of adoption of educational innovation by teachers. The analogy sees an adult (teacher/student) as being asked to accept (adopt/participate in) a new program. Implementation theory, derived from theories of social change and innovation diffusion, is conceptualized as the process intended to facilitate the actual use of an innovation. It

requires viewing the problem on several dimensions at the same time, focusing on interactions among and between the characteristics of the user, the innovation and the agency. By synthesizing the parts of implementation theories most compatible with the problem of participation in adult education programs, a framework was developed. By analyzing the user both as a system and as a group comprised of individuals, the agency whose job it is to deliver the innovation, and the innovation, obstacles to the forming of a relationship among these elements are identified and strategies to alleviate the obstacles are suggested.

The study additionally described an application of the theory to the hypothetical circumstance of a labour education program sponsored by the University of Victoria Extension Division. The application used empirical data collected through surveys and interviews. A survey was completed by a sample of 193 active union members in Greater Victoria, identifying common demographic variables and perceived obstacles to participation in adult education. Interviews were conducted with representatives from the labour community to ascertain their view of the role of organized labour in a labour education program sponsored by the University Extension. Interviews with the Extension personnel were conducted in order to gather information for the analysis of the agency. Finally, interviews were


conducted with other postsecondary institutions' personnel who have been involved with labour education, in order to contribute information identifying possible obstacles. The result of the application materialized as a list of recommended strategies to increase the likelihood of participation of union members in such a program.

The recommended strategies are organized under the sections from which obstacles are identified, namely: The user as a system, the users as individuals comprising the group, the agency, the innovation and the socio-political context.

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TABLE OF CONTENTS

Abstract i-iv  
Table of Contents v-vi  
Figures vii  
Tables viii-ix  
Acknowledgements x

Chapter I Background and Purpose 1

Chapter II Review of Relevant Literature 8  
Overview 8  
Adult Education 12  
Curriculum Implementation 21

Chapter III Conceptual Framework 32  
Overview 32  
Implementation 34  
Implementation for Adult Education 39  
Definitions 45

Chapter IV Context Of The Application 47  
Labour Education at Postsecondary Institutions 47  
University of Victoria Extension Division 51  
Approaches to a Labour Education Program 53

Chapter V Method For The Application 60  
Overview 60  
Describing the Elements 60  
Sources of and Procedures for  
Obtaining Information 64  
Obstacles and Strategies 67

Chapter VI Application Of The Theory 69  
Description of Elements 70  
Labour Community 70  
Union Members 84  
University of Victoria Extension Division 99  
Labour Education as Innovation 108  
Socio-Political Context 110  
Obstacles to Implementation 114  
Labour Community and University Extension 116  
Labour Community and Labour Education 122  
University Extension and Labour Education 122  
User, University Extension and Labour  
Education in Socio-Political Content 124

Summary	125
Strategies	129
Chapter VII. Conclusions	147
References	153
APPENDICES	159
Appendix A User System: A Detailed Inventory	160
Appendix B Population of Union Members in Greater Victoria	162
Appendix C Survey Distributed to Sample	166
Appendix D Agency: A Detailed Inventory	168
Appendix E Interview Protocol for Postsecondary Personnel	170

## Figures

- Figure 1 Schematic representation of adult education problem of participation seen as analogous to public schooling problem of adoption of change. 5
- Figure 2 Bolam's conceptual framework for the study of educational innovation. 24
- Figure 3 Critical element in implementation process in school systems and adult education. 39
- Figure 4 A conceptual framework of implementation elements and their interrelationships (for adult education). 40

## Tables

Table 1	A Comparison of the Emphasis in the Literature in Curriculum Studies and Adult Education	10-11
Table 2	Stages of Implementation: Havelock (1973) and Leithwood (1974)	26
Table 3	Bolam's Components of Implementation (1975) Compared to Fullan's Categories of Determinants (1980)	29
Table 4	A Comparison of Features Characteristic of a Public School System and Adult Education	33
Table 5	Proposed Sample of Union Membership in Greater Victoria	66
Table 6	Survey Distribution and Rate of Return (Unions)	85
Table 7	Survey Distribution and Rate of Return (Labour Council and CLC Labour School)	85
Table 8	Proportionate Representation of Population and Sample Identifiable by Union Sector	86
Table 9	Personal Characteristics (Sex, Age, and Marital Status)	89
Table 10	Educational Attainment	91
Table 11	Occupational Status	92
Table 12	Adult Education Experience	92

Table 13	Sponsorship of Educational Activity	93
Table 14	Educational Experience by Category	95
Table 15	Perceived Barriers to Participation	97
Table 16	Perceived Barriers to Participation: Comparison of Responses in Konrad et al Study (1979) to Responses in Present Study	98

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## Chapter I

### BACKGROUND AND PURPOSE

The purpose of this paper is to develop a theoretical framework to facilitate attempts to increase participation in adult education. An application of the general theory to a specific hypothetical circumstance in adult education will illustrate its utility for the problem of participation.

Adult education in the main, is dependent upon voluntary participation of students. From the point of view of institutionalized adult education, participation can be defined as involvement in formally organized activities and structures. Where a program attracts little or no involvement, there is a problem. The problem is manifested especially where new programs are considered or new audiences sought.

The resources of most adult education institutions are constantly stretched to the limit. Programs are designed to recover costs through tuition. Courses with a proven demand are safe in this regard. Innovative courses, on the other hand, are a risk as they may not attract participation, hence may place the institution's finances in jeopardy. The consequence is that traditional courses account for the majority of offerings in most adult education institutions; innovative courses are rare (Lowe, 1982).

It is in the interest of both the adult education institution and the adults as learners to introduce new

programs. The institution stands to gain overall increased enrollment, the adult as learner, greater educational opportunity. Furthermore, from a philosophical stance, most adult educators agree that greater participation is desirable and "essential to the maintenance of a democratic society". (Boshier, 1979, p. 151). The challenge for the adult educator is to attract new learners to new courses. The problem, stated in the interrogative is: How does one facilitate participation in a new program?

The adult education literature does not provide an overall theory for guiding attempts to increase participation. Rather, the literature approaches the problem by characterizing the participants, manipulating material conditions of institutions, or considering the problem to be a marketing issue.

Much useful research has been conducted regarding the nature of the participants. Demographic variables, motivation orientations and deterrent factors are identified from surveys and questionnaires. As an explanation and description of the problem and as a source of obstacles, this approach is useful. However, in its present form, it doesn't provide a model for dealing with the problem of low participation.

When participation is seen as an issue of access, material conditions of the institution are analyzed to determine what barriers exist. Location of course, method

of delivery, registration requirements, scheduling and tuition are examples of the obstacles identified. While these factors represent one area of concern, they do not provide either a comprehensive view of the problem nor a method for its solution.

Another approach to participation is to consider it a marketing issue. The adult learner is considered a "consumer" who needs to be persuaded to buy the "product", an educational program. As one tactic for encouraging participation, marketing has some use, however as an overall strategy it has two weaknesses. Marketing is often viewed as a post hoc activity; once you have the "product", you market it. This approach assumes that the product is one people will want if they are told about it, a dangerous assumption at the best of times. Even when it is considered to be an integral part of planning as proposed by Hoegg (1979), it is inadequate. Marketing, a business concept, is based on the selling and buying of goods or services and education, properly is neither. Guinsberg (1981) expresses the dangers of adopting a marketing approach by calling it a "merchandizing approach" and warning adult educators that

It would be foolish to deny the need of continuing educators to develop an awareness of the market. Yet, neither should they be possessed by narrow considerations of salability. Inherent in any continuing education program is some 'tension . . . between pecuniary and educational values'. If administrators of university programs are too susceptible to the former, they risk being ridiculed as cultural vendors, as a column on university continuing education in the New York Times did a

couple of years back with the delicious heading, 'Hey, Getcher Savwor Fare - Red Hot!' (p. 20).

This brief explanation of approaches to participation in the adult literature will be developed in the next section. At this point, the explanation is included only to point out that there is a lack of comprehensive theoretical models to guide attempts to increase participation.

The problem of lack of participation in adult education can be seen as analogous to one experienced in public schooling, namely teacher resistance to educational change. Innovations developed for teacher use are often neglected by the teacher, impeding the introduction of change. In public schooling, the problem stated in the interrogative is: How does one facilitate adoption of an educational change? Where the innovation proposed is a new program, the analogy, as shown in Figure 1, is clear: An adult (teacher/student) is being asked to accept (adopt/participate in) a new program. In each case, it is the stage of acceptance which determines whether or not a relationship will be formed between the adult and the program.

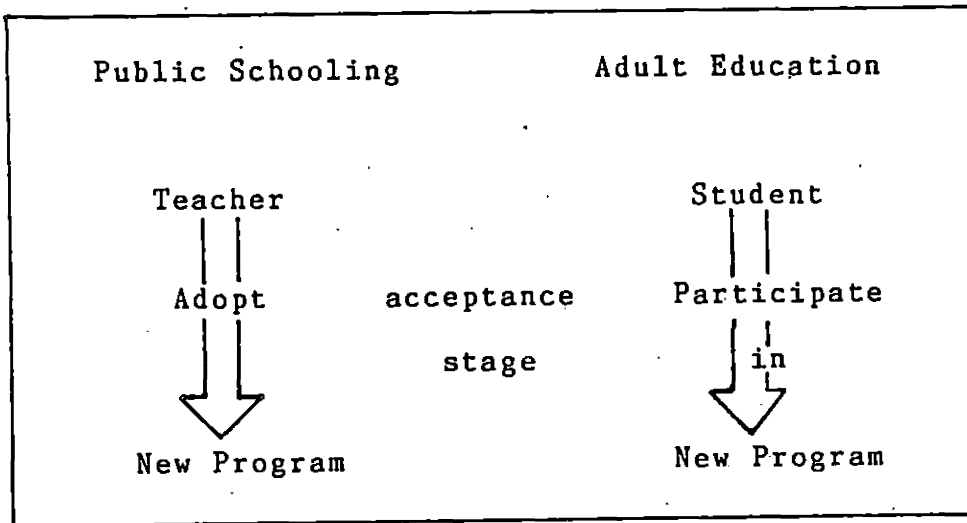


Figure 1. Schematic representation of adult education problem of participation seen as analogous to public schooling problem of adoption of change.

In the curriculum literature centered on public schooling, the problem of teacher resistance to educational change is addressed in theories of implementation.

Implementation is conceptualized as the process intended to facilitate the actual use of an innovation, starting from its inception. Derived from theories of social change and innovation diffusion, implementation theory gives rise to strategies which encourage adoption of change.

It is to the literature on curriculum implementation that this study looks for the development of a theory for increasing participation in adult education programs. Theories of implementation have been reviewed for their appropriateness to the adult education context. By synthesizing the parts of the theories most compatible with the problem of participation in adult education programs,

this study develops a theoretical framework useful for dealing with the stated problem. Having developed the theory, the paper outlines an application to the hypothetical circumstance of a labour education program sponsored by the University of Victoria Extension Division.

The remainder of this paper proceeds by first explaining the approaches to participation that are common in the adult education literature and outlining their limited use for providing models for increasing participation. Theories of implementation, as developed in the curriculum literature, are outlined in order to illustrate the essential usefulness of the theories to the problem of participation in adult education. Leading from the information provided in these two areas, the paper develops a theoretical framework for dealing with the problem of increasing participation.

An application of the theory follows its explanation. Labour education programs have been a consistent problem with postsecondary institutions and for this reason, a labour education program at the Division of Extension of the University of Victoria has been chosen for the application. The paper describes the context of the application, the recommended approach to labour education as a curriculum innovation, and the essential features of the University of Victoria Extension Division.

Finally, the paper outlines how the application

proceeded, including the kinds of information needed, the way the information was gathered and how the information was used to produce a list of recommendations for increasing the likelihood of participation of union members in a labour education program sponsored by the University of Victoria Extension Division.

## Chapter II

### REVIEW OF RELEVANT LITERATURE

#### Overview

Adult education literature typically lacks a strong theoretical basis. The deficiency is evident in several areas of adult education but relevant to this study is the lack of theory to deal with the problem of increasing participation. Research on participation does however, provide much useful information. In particular, for this study, variables which have been determined to motivate participation or alternatively present barriers to participation will be useful. Similarly, useful in a limited way, is the concept of marketing as a tactic to attract participation. The usefulness of the approaches to participation and the limitations will be explained.

Table 1 compares the practical emphasis in the literature in adult education to the more theoretical emphasis in the literature in curriculum as it pertains to public schooling. One can see that while practical information is readily available in the former, theoretical constructs are more prevalent in the latter. Notable in the comparison is the development of a theory in curriculum to deal with the problem of introducing educational innovation

which has no counterpart in the adult context. Since this study views the problem of participation as analogous to the problem of innovation adoption, implementation theories will be reviewed. The theories applied to public schooling provide the basis for development of a theoretical framework useful for considering the problem of participation in adult education.

Table 1

A Comparison of the Emphasis in the Literature in  
Curriculum Studies and Adult Education

CURRICULUM STUDIES	ADULT EDUCATION
<u>Development (Planning)</u>	
<ul style="list-style-type: none"> <li>- discusses philosophy or image of educated man, then aims, goals and objectives for achieving that ideal</li> </ul>	<ul style="list-style-type: none"> <li>- discusses needs assessment to identify interests of learners and to develop objectives</li> </ul>
<ul style="list-style-type: none"> <li>- discusses decision making process, locus of control and implications</li> </ul>	<ul style="list-style-type: none"> <li>- prescribes planning steps and recommends involvement of learners in planning process though little is offered by way of reasons for so doing</li> </ul>
<ul style="list-style-type: none"> <li>- discusses nature of the learner, of knowledge and of the social situation, internal and external consistency</li> </ul>	<ul style="list-style-type: none"> <li>- talks about the characteristics of the learner, motivations and obstacles to participation</li> </ul>
<ul style="list-style-type: none"> <li>- models based on theoretical constructs labelled as: management, systematic, open-access, linear-expert, circular consensus and dialogical (for example)</li> </ul>	<ul style="list-style-type: none"> <li>- models based on practice labelled as: The Continuing Education Programmer's Manual, the Guide for Health Professionals, Houle's Model (for example)</li> </ul>
	<ul style="list-style-type: none"> <li>- discusses promotion of program. Based on a theory of business marketing, education is viewed as a product to be promoted to the consumers (learners). It employs standard business tactics of market analysis, use of media print material, packaging,</li> </ul>

- public relations officers, etc. The potential learner must be encouraged to participate in the program offered.

### Implementation

- based on a theory of change and innovation diffusion, it is defined as putting the program into use. Where it is essential (to planners or developers) that the program be used precisely as developed, it is called "fidelity implementation". Where there is room for modification by the user, it is called "mutual adaptation". In either case, implementation theory involves overcoming obstacles along the way to program use. The user is the teacher who must be encouraged to use the program.

### Evaluation

- |  |  |
|--|--|
| - discusses formative, summative evaluations   | - discusses formative, summative evaluations   |
| - evaluation as measurement, scientific research, decision oriented, professional judgement, goal-free or responsive and transactional | - evaluation as measurement, scientific research, decision oriented, professional judgement, goal-free or responsive and transactional |
| - accountability   | - accountability   |

### General Tendency

- |                          |                           |
|--------------------------|---------------------------|
| - theoretical discussion | - practical prescriptions |
|--------------------------|---------------------------|

## Adult Education

The field of adult education as an area of academic study is relatively new and has grown rapidly over the last ten years. The explosion of interest and expansion of offerings which occurred in adult education institutions over the last three decades placed great demands on the institutions and practitioners. As a result, much of the literature written over the last ten years is of a practical nature, intended to provide administrators and practitioners with a prescriptive method for conducting effective programs. Lack of theory is a general problem in the adult education literature. Houle (1972), when speaking about books on program development, laments, "If such books deal with theory, it is often by the assertion of values or beliefs . . . but they are essentially how-to-do-it-manuals" (p. 245). Similarly, in concluding a comparative study of ninety program planning models designed for use in various adult education contexts, Sork (1983), noted that the "literature was generally quite weak in the development of explanatory systems to justify the prescribed planning approaches" (p. 54). Colin Griffin (1983) describes curriculum theory in adult education as being a generally neglected area. Sean Courtney (1981) in a discussion of participation in adult education bemoans the fact that research has produced so little in the way of theoretical models in that area.

The effects of this general lack of theory are many and varied. From a philosophical point of view, Griffin (1983) says the deficiency results in a preoccupation with material concerns and avoids more abstract issues such as the aims of adult education seen in the context of knowledge, culture and power. From a more practical point of view, Boshier (1979) indicates that there is effectively no theoretical model for guiding educators in their endeavours to increase participation. It is this practical area that will be developed here.

#### Approaches to Participation

In an analysis of literature on participation in adult education, Courtney (1981) provides an interesting perspective by pointing out that research in the area can be traced back as far as 1933 and yet researchers still bemoan the lack of progress. Research has been conducted mostly via surveys of participants.

#### Demographic Variables

Nominal data has been collected from various participation studies and provides a list of demographic variables associated with participation. An almost universal finding is that participants have a higher level of formal education than non-participants. In studies conducted nationally in the United States in 1965 by Johnstone and Rivera and in 1974 by Cross, Valley and

Associates, in New Zealand in 1971 by Boshier, in Ontario in 1977 by Waniewicz and in British Columbia in 1973 by Dickensen et al., this fact was found to be true. Similarly occupational status and level of income consistently relate positively to participation in adult education.

Other variables associated less strongly with participation are age, where the bias tends to younger adults, marital status where it tends to single adults and sex where some studies have shown a bias towards males (Cross, 1974; Waniewicz, 1977).

While statistics regarding these variables are not in themselves helpful for encouraging participation, they do indicate one vast problem. If educational attainment is the variable most strongly associated with participation, then the proliferation of adult education programs is simply widening the gap between the educationally privileged and underprivileged (Guinberg, 1981; Lowe, 1982). This problem is tackled by identifying motivational orientations to participation.

#### Motivational Orientations and Deterrent Factors

In 1961, Houle conducted interviews with twenty-two adult students to determine their motivations for participation. He concluded that generally adults are motivated either by orientations to an activity, a goal or learning. Several studies have since been conducted leading to a general refining of the orientations but supporting

Houle's (1961) original typology (Courtney, 1981).

Boshier (1977) has labelled such factors as motivation orientations. Using scales such as Boshier's (1971) "Educational Participation Scale", (EPS), items are selected by respondents according to their reasons for participation. The items are factor analyzed to show major orientations. A study conducted by Goode (1981) in the United States for an example, used the EPS to determine motivations of trade unionists for attending college. Goode's study indicated that like other more heterogeneous groups of learners, unionists are motivated by learning orientations as well as job related goal and activity orientations.

Recently, researchers have attempted to determine factors which prove to be obstacles to participation. Cross (1974) categorized the barriers as: situational, such as lack of time for study, lack of child care, lack of transportation, lack of place to study, and expense; dispositional, such as the adult feeling too old, lacking confidence, and past educational failure; and institutional, such as cost, scheduling and delivery methods. Waniewicz (1976) used similar items in his survey and found similar results. A study conducted in Alberta by Athabasca University (1979) showed Union members identified the same barriers preventing them from participating in labour education. A recent study conducted with health care professionals empirically determined six categories of

deterrents (Scanlan and Darkenwald, 1983). Using forty items identified as deterrents during interviews, a factor analysis produced six major factors: disengagement (being mainly dispositional), lack of quality (of program), family constraints, cost, lack of benefit and work constraints. The researchers concluded that for health care professionals, the deterrent factors produced were strong predictors of participation and recommended that the deterrent construct be further developed.

The findings of this type of research are useful to a degree but as Boshier (1979) says in referring to a 1968 article by Herbert McCloskey, there is a lack of theoretical models to guide attempts to increase participation and notes that the most one can do is "group the relative independent variables into those influences essentially internal (psychological and cognitive) and those derived from the individual's external environment" (p. 151). Supposedly by maximizing positive influence and minimizing the negative, participation could be increased. For this study, having the variables identified is useful. They will be considered a source of information for obstacle identification in the framework proposed.

#### Access

The next logical step after identifying obstacles is to attempt to reduce the obstacles. The literature deals with this primarily by discussing the problem from the point

of view of access to institutions. The issue is approached from both philosophical and practical stands. The former talks about adult education as an entitlement of the same status as health care and food. Education is a democratizing force and a way to bring about justice and equality (Kidd, 1979). The practical approach is one put forward by administrators interested in attracting adults to programs in order to offset difficulties created by the declining enrollment of the traditional 18-24 year-old age group of students (Pedersen and Fleming, 1974). Whether the access issue is pursued from a philosophical or practical viewpoint, the conclusion is the same. Institutions need to break down barriers to participation by implementing different curricula, employing alternative delivery modes, and changing organizational arrangements.

In discussing curricula changes, the adult educators speak less to the actual content and more to the methods of developing content. A common theme is that institutions must be more responsive to the community's needs. Jones (1980) says curricula should be implemented only after development work with potential audiences such as employers, trade unions, professional groups, Native groups, women's organizations and senior citizens' groups. He insists that while maintaining a stance of academic excellence, it is possible to address community interest in the curricula.

Delivery modes content traditional for institutions,

such as scheduled classroom lectures, are attacked as barriers to participation. Adult educators propose numerous alternatives for delivery modes running from such common ideas as correspondence courses to more imaginative forms of distance education such as tele-conferencing, satellite transmittal of television programs, and of course use of the microcomputer (Cross and Associates, 1974).

Where the traditional classroom setting is discussed, more flexible scheduling is indicated. Conference courses, weekend courses, modular courses and periodic classes are suggested as possible ways of dealing with some of the more obvious obstacles (Guinsberg, 1981). More radical alternatives of actually taking the classroom to the factory shop floor have been attempted in the United States (Jones, 1980). Other responses are out-of-town extension centres, learning centres and information centres. Cross (1974) sums up the area by saying the focal point is to "put students first and the institution second, concentrate more on the former's needs than the latter's convenience (p. 2).

Obstacles and suggestions for their removal as proposed in the literature on access are useful to the degree that they identify one aspect of a complex problem. The framework proposed for discussing participation in this study recognizes obstacles arising from descriptions of the institution as only one source of obstacles.

## Marketing

A simplification of the problem is to view participation as a marketing issue. The literature in this area borrows concepts from business and superimposes them on an educational setting. From this view, the adult learner is thought of as a "consumer" who needs to be persuaded to "buy" a product. It assumes that if potential learners have enough of the right information they will want to participate.

Most planning manuals talk about marketing as a post hoc activity. These "how-to-do-it" manuals intended for practitioners, supply prescriptions for promotion including use of electronic media, print and other means of communication. The Continuing Education Programmer's Manual (1981) published by the British Columbia Ministry of Education is a good example of this type of manual. Under a section called "Promote and Market Courses", the manual provides practical information to the program planner. As a simple tactic for conveying information to potential students, it is useful. With most adult education institutions relying on courses running on a cost-recovery basis, it is easy to understand the use of marketing as a tactic for attracting participation. Buchanan and Barksdale (1944) administered a survey to State Universities and Land-Grant Colleges to determine their methods of promoting courses. They conclude from the response that even if they

don't recognize the fact, most continuing education administrators use business marketing techniques. They recommend that the marketing function should be refined and practiced by extension administrators.

Similarly, Hewick and Munro (1983) using the marketing terms "pricing, placement, promotion and product", recommend business marketing techniques to administrators of continuing education who must remain alert to their market shifts, "think of the learner as a consumer, and realize that there will be increased competition for this consumer's educational dollar" (p. 14).

Both of these studies consider marketing as a process in education completely analagous to the process in business and so borrow concepts directly. As an overall strategy for increasing participation, in adult education, business concepts are inadequate. The product may be saleable but the quality of the enterprise in educational terms is not guaranteed by the process.

Hoegg (1979) attempts to manipulate business concepts to show their usefulness in an educational planning problem. By using Houle's (1972) model of program planning, she illustrates how typical marketing questions can be applicable to the several stages of planning, particularly in identifying adults' interests and needs in education. By "marketing the program", Hoegg means "communicating information about new or existing programs to clientele

whose interest is known or predictable" (p. 14).

Her illustration is the most useful in that it uses a defensible starting point namely Houle's planning model, but nevertheless oversimplifies the problem by ignoring the complexities of variables known to create barriers to participation.

While much useful information about participation is provided in the adult education literature, it doesn't include a theory for increasing participation. Rather, it further clarifies the problem, identifies some very useful variables associated with participation and offers one tactic for dealing with the problem. It is in the curriculum literature that a theoretical framework may be found.

### Curriculum Implementation

Unlike the adult education literature, curriculum literature is heavily weighted to the theoretical side of a continuum which may be seen to range from completely practical to solely theoretical. Theories dealing with educational change gained much momentum in the last decade. It is the contention of this study that implementation theory is equally useful for an adult education setting. Dealing with the successful introduction of education innovation, the theory can be applied to participation

by considering the program as an innovation and the student as the user.

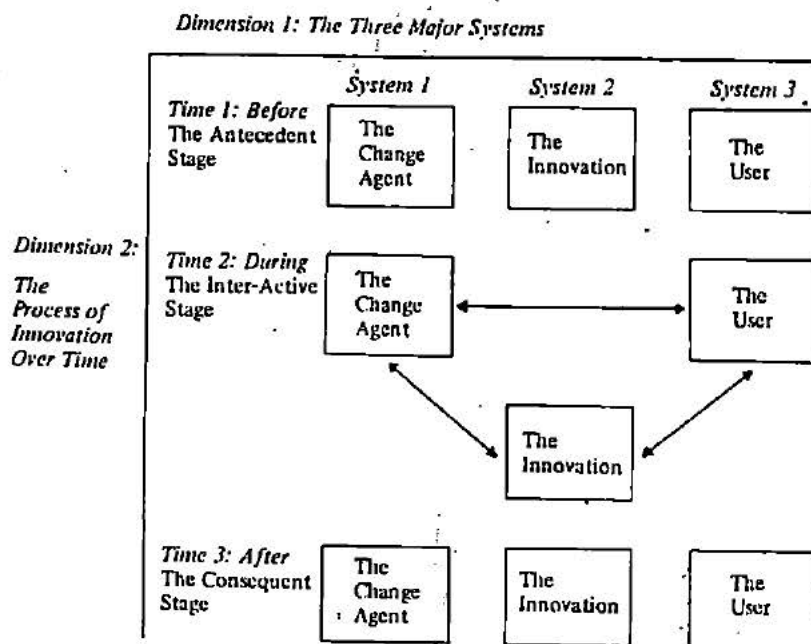
Implementation theory was developed to deal with a problem which Fullan (1980) says proliferated in the 1970's, that is, failure in attempts to introduce reforms. It is, says Fullan (1980), "a multivariate business which requires us to think of and address more than one factor at a time" (p. x).

Havelock (1975), after studying hundreds of scholars, researchers and practitioners, concludes that there are essentially three orientations to the change process, not just in education but from several fields. The first, which he labels the Research Development and Diffusion Model, attempts to be "user-proof", or in other words, allocates much time to the initial stages of anticipating problems and developing a final package assumed to be suitable for mass audience dissemination. The second model, which Havelock labels the Social Interaction Model, emphasizes patterns by which innovations diffuse through a social system. Much of the information used to build this model comes from rural sociology and views the process of adoption as a natural phenomenon embedded in the social system. The final model is the Problem Solving Model which Havelock says rests on the primary assumption that the innovation is part of a problem solving process beginning with a need. Implementation theories incorporate aspects of each of these

approaches.

Fullan and Pomfret (1976) describe implementation as a process which consists of "a series of interactions within the user group and between this group and the developer and adopter groups . . .[evolving] in response to the environmental context, the innovation's characteristics, the planning and adoption process, status and power networks within and among groups, individual characteristics of group members and strategies used to adopt and implement the innovations" (p. 6). Similar explanations have been proffered by Bolam (1975), Havelock (1973), and Leithwood (1980). While all of these specialists agree on the definition of implementation, each has taken a slightly different tack in their research.

Ray Bolam (1975) has provided a conceptual framework for the study of educational change. By drawing from the literature on change, he arrived at three major components of the process, seen in an interaction through time. The process is illustrated in Figure 2.



**Figure 2.** Bolam's conceptual framework for the study of educational innovation (Bolam, 1975, p. 274).

While he admits the model is simplified he suggests its usefulness is in its focussing an understanding. The present study modified this framework for reasons explained under the section entitled "Conceptual Framework".

Ronald Havelock (1973) has produced a manual which guides a change agent through the process of implementation. Havelock breaks the process down into six stages which he labels: Building a Relationship, Diagnosing Problem, Acquiring Relevant Resources, Choosing Solution, Gaining Acceptance, Stabilizing the Innovation and Generating Self-Renewal. Havelock's writings are particularly strong in the area of the user system. In great detail, Havelock explains the necessity of building a relationship with

influential people in the system. He provides specific tactics and examples of approaches for doing so. His work is written in a general way to be useful for change agents working in different settings like community colleges as well as the public schools and so is most useful for the present study. Havelock's guide includes identification of obstacles and strategies which have been developed from the combined experience of researchers and practitioners.

Leithwood's early works provide a general approach to successful implementation. In Planning Curriculum Change: A Model and Case Study (1974) he derived "stages" of implementation experientially. These, he says, are the critical landmarks in determining appropriate paths toward the distant goal. They roughly resemble Havelock's stages as shown in Table 2.

Leithwood, however, does not see these stages as necessarily linear. Similarly the present study, while it will of necessity incorporate the stages proposed, does not treat the process as linear, but rather as a series of interactions among the key elements which result in possible strategies or solutions. Leithwood also emphasizes the need to work closely with the client (user) and discusses obstacles to be anticipated in the process.

Table 2

Stages of Implementation: Havelock (1973) and  
Leithwood (1974)

Havelock	Leithwood
Building a Relationship	Diagnose context for change Assess climate for change Develop seminal organization Develop working organization
Diagnose Problem	Define general problems and goals. Assess specific needs with client
Acquiring Relevant Resources Choose Solution	Develop, choose, and/or modify solutions
Gain Acceptance	Implement solution with client.
Stabilize the Innovation	Evaluate solution with client
Generate Self-Renewal	Revise solution with client

Early on Regan and Leithwood (1976) described conceptual obstacles to be a focus on the product, a focus on the structure, illogical diffusion models, and over-simplified strategies. In his later work, Leithwood (1980a) categorizes obstacles as lack of skills/knowledge; lack of motivation, incentive or reward; and lack of resources or organizational structure. Each of these lists, as well as the stages of implementation outlined are useful for an adult education setting. Where Leithwood considers the user to be a teacher or school administrator, this study

will consider the user to be the adult student. The categories of obstacles resemble those suggested by Cross (1981) in the adult education literature (situational, dispositional and institutional) a fact which provides evidence to the earlier claim that the problems of participation in adult education and innovation adoption in public schooling are not unlike.

Leithwood (1980a, 1980b) and Leithwood and Montgomery (1980) have done much recent work on describing innovations. While this work is primarily concerned with evaluating implementation it is equally useful for planning implementation. Experts in the area agree that success relies upon careful analysis of the innovation [Bolan (1975), Havelock (1973), Fullan (1980)]. Leithwood provides dimensions for describing a curriculum innovation and sources for establishing such dimensions. Leithwood uses the dimensions to construct a growth scheme for measuring implementation by observing the behaviour of the user against the dimensions of the innovation. This refined conceptualization is less useful for the present study because it relies on the teacher/user paradigm and offers little flexibility. In its early stage of development however, it provides systematic means and ways of describing the innovation.

Fullan has incorporated the work of several specialists in educational change in his work called the Meaning of Educational Change (1980). The early work which he did alone and with Allan Pomfret (1977) is included in this comprehensive work. Talking about implementation as organized common sense, Fullan discusses the process from the point of view of several players in the game: the teacher, the principal, the student, the district administrator, the consultant, the parent and the community. Although it is focused specifically on public school system problems, his general determinants for successful change loosely match Bolam's components and provide further evidence that the framework is useful.

The comparison in Table 3 shows an addition to Bolam's components which Fullan calls the "characteristics external to the local system". Describing this component as the political and social context in which the other elements are working, Fullan (1979) considers these contextual factors important to the process. The present study will likewise incorporate external factors in the framework so that the user, the agency and the innovation will be set inside the socio-political context.

Table 3

Bolam's Components of Implementation (1975) Compared  
to Fullan's Categories of Determinants (1980)

Bolam's Components	Fullan's Categories of Determinants
Innovation	Characteristics of the Change
User	Characteristics at school level [e.g., teacher (user) characteristics]
Change Agent	Characteristics at School District Level
	Characteristics External to local system

Fullan also raises the problem of "fidelity" vs "adaptation" models of implementation. Where the former requires adoption of the innovation without variance the latter allows that the user may change or adapt the innovation to suit his particular needs. This latter model suits the adult education setting where adults are encouraged to express their needs and expect them to be met.

Many other authorities have contributed to theories of educational change and provide sources for the planning of strategies for successful implementation. In a discussion based on the theory of information diffusion, House (1974) provides evidence to show the need for "face-to-face personal contacts" in order to have an innovation adopted

(p. 3). Particularly useful for this study is his claim that sponsorship is a "powerful factor" in promoting and rejuvenating innovation. Where a user system can be viewed as a sponsor of the innovation, it follows that the system must first be encouraged to adopt and become advocates of the innovation.

In a discussion on beliefs, Werner (1979) points out that where there is a basic philosophical difference between the innovation and the users, implementation will be impossible. There is an implication for adult education. If adult learners must agree with the philosophical basis of the innovation, then at its inception, their beliefs must be considered and incorporated.

Gilbert De Landsheere also produces a list of factors which he claims cause resistance of teachers to accept innovations. Of the fifteen causes, those useful out of a public school context are: innovation running counter to dominant forces in the community; attitudes deeply imbedded in teachers (users) not congruent with the innovation; and conditioned response opposed to change. These causes were identified from an international study and their similarity to Werner's discussion of beliefs shows the universality of the problem and indicates the need to work closely with the users.

Huberman (1973) produces a list of variables useful for identifying sources of obstacles. The study attempts to

sum up the knowledge of the process of innovation to that date. Variables identified are complexity of the innovation, its cost, communicability, divisibility into parts, the nature of the relationship between source of change and the persons being helped to change and the congruence between the innovation and the environment.

Another international study reported by Adams and Chen (1981) concludes with a list of twelve propositions common to successful innovations in seven different countries. The propositions support most of the findings already discussed and add a dimension which is useful for this study, namely "the initial acceptability of an innovation is a function of the extent to which, as a change, it is seen to threaten the power of existing groups. The less the perceived threat, the greater the acceptability" (p. 268). When the user system is formed as a political structure, it is necessary for the agency and the innovation to be seen in a way which is non-threatening to the political power structure.

If one views participation in adult education as a problem which resembles introducing educational change in a public school system, not only are there well-developed theories to apply to the problem, but also some very practical advice.

The following section shows how the framework can be applied to participation in adult education.

## Chapter III

CONCEPTUAL FRAMEWORK  
Overview

The conceptual framework for this study of adult education and participation is drawn primarily from the curriculum literature as it pertains to the introduction of change in public schooling. This section begins by describing some essential differences between systems of public schooling and adult education. The differences are referred to when the case is made that typical theories meant for public schooling require some modification to be completely appropriate for adult education. It concludes by describing the theoretical framework as it is construed in this study to apply to problems of participation in adult education.

Table 4 provides a simple comparison of the essential features of public schooling and adult education. The ultimate goal of each, as noted, is to provide a quality education. The means of achieving that goal differ slightly as one can see from a glance at the details named in Table 4. The most notable differences which will be addressed when developing a framework for a theory to guide attempts to increase participation are the voluntary nature of student participation in adult education which is not true of public schooling, and the bureaucratic and authoritative structure of public schooling which is not true of adult education.

Table 4

A Comparison of Features Characteristic of a Public School System and Adult Education

SCHOOL SYSTEM	ADULT EDUCATION
- institution-centered	- ranges from informal to institution-centered
- all children of school age must attend	- voluntary attendance
- programs relatively stable, system-wide, subject-centred	- programs short term, ad hoc, episodic, fragmented and idiosyncratic (Devlin, 1984) and issue-centred
- policies initiated by a central authority and imposed on districts and individuals	- policies peculiar to the agency or individuals involved. Often established in conjunction with learners
- large legislative and bureaucratic structure: governing on a provincial basis	- little legislative or bureaucratic involvement. Structures vary with agency
- teachers comprehensively trained, and hired on a permanent basis	- teachers usually practitioners in the subject area (eg. Health Care, Welding, etc.) generally hired for the duration of educational activity (i.e., part-time)
- curriculum, materials, instructional strategies usually purchased commercially developed at a provincial level or local district level	- development of materials, instructional strategies and course content usually specific to course or program
- aims established by the legislative body	- aims established by the participants
- <u>goal to provide quality education</u>	- <u>goal to provide quality education</u>

## Implementation

Implementation in curriculum theory is described by Fullan and Pomfret (1977) as not merely an extension of planning, but as "a phenomenon in its own right" (p. 336). As previously explained, it is defined as a process which involves planning for the actual use of an educational change or innovation. Throughout the process, obstacles are identified and plans for overcoming them are made.

Fullan (1980), Bolam (1975) and Havelock (1973) discuss relationships among the client, the change agent and the innovation. Leithwood (1980) sees implementation as

growth on the part of educational agents toward role behaviors believed to facilitate student growth . . . describing growth within selected, innovation relevant dimensions. As this growth may be retarded by obstacles, deliberate strategies are likely required if such obstacles to growth are to be overcome (p. 3).

Theories of implementation typically involve three elements. Although various labels have been attached to the elements, they essentially describe a person or system which attempts to initiate a change, an innovation or the change itself and a user or user group.

Havelock (1973) and Bolam (1975) talk about the change agent and Leithwood (1980) about the education agent as a major element in the process of implementation. Fullan (1980) uses a broader concept by discussing the source of the change. In each case, the author suggests that the system, person or institution proposing the change is a

major element to be considered in the process of implementation.

For the adult education setting, there may not be such a clear-cut view of change agent or source of change. The typical paradigm in public schooling involves a program developed for teacher use by a central authority removed from the teacher's locale as shown in Table 4. Usually the Ministry or some other legislative body, this "source" is in a position to make a directive concerning the proposed change. Curriculum literature speaks to the effective ways for the change agent to introduce the change from a view of the change agent as the operational force. In adult education settings, there would rarely be a change proposed by way of directive from change agent to user. In fact, the initial proposal for change may, and often does come from the user group. For this reason, the framework for a theory intended for increasing participation will consider this element as the agency, allowing it to be viewed as an element which is not necessarily the source of the proposed change but as the medium for delivery of the change which may be the source or not.

The literature consistently discusses the nature of the innovation as an important feature. Leithwood (1980) has done some of the most concentrated work in this area. He has established an "Innovation Profile" for describing the dimensions of a curriculum innovation.

There are nine dimensions to his description: Image or Platform, Student Entry Behavior, Content, Instructional Material, Teaching Strategies, Learning Experiences, Time, Assessment Tools and Procedures. Other authors, notably Havelock (1973) and Fullan (1980) are less specific as to the actual dimensions but equally explicit as to the necessity of a clear understanding of the innovation. In adult education, such specifics as course content, learning experiences and teacher strategies are properly planned in cooperation with the learner (Knowles, 1980). At the stage of inception of a new program, when the process described by the framework for increasing participation is meant to be used, such detailed information would not be available. Rather, Leithwood's first dimension would provide an adequate description by considering a platform for the program.

Implementation theory specifically relating to the public school system identifies the classroom teacher as the user and the third important element in the process. Since most curriculum changes are initiated in higher levels of the hierarchical school system structure, obstacles are traced down through the chain of administration and ultimately to the classroom. The most common obstacle and the element receiving most attention in the literature is classroom teacher resistance. If the teacher is unwilling or unable to "internalize" the proposed change, the students

will be unable to reach the preferred status specified in the goals of the curriculum (Fullan, 1979). Consequently, the literature looks at strategies to overcome any resistance anticipated or encountered through the classroom teacher.

The differences between public schooling and adult education are shown in Table 4. Curriculum changes in adult education would be more likely to occur locally and would often be initiated by the instructor or in any event an instructor amenable to the proposed change would be engaged. Seldom would an instructor represent the most critical element in the implementation process. However, as participation in a program is voluntary on the part of the learner, in an adult education setting the same kind of resistance may be shifted from the teacher to the adult as learner. This assumption is supported by many writers.

Fullan and Pomfret (1977) allow that in some cases the student may be the user and, "the identification of who the users are in any given situation is an empirical question . . . the individual characteristics of its members are of particular interest" (p. 5).

It is eminently reasonable to identify the student as the user in adult education; it is the student who makes the ultimate choice of participating or not, thus adopting the innovation or not. Figure 3 illustrates the process of implementation from the point of view of a public schooling

problem and an adult education problem. If one considers the adult student as the user of the innovation and thus critical element in the implementation process, the theory lends itself well to the development of a theory to increase participation in adult education. One simply needs to shift the focus of the theory from the user as teacher to the user as adult student.

Not only is the basic framework appropriate but problems identified from the public schooling context are useful as well. For instance, Leithwood's (1980) classifications of obstacles to the teacher's acceptance of change are as useful for judging the propensity of an adult to participate in a learning activity as they are for the teachers for whom they were intended.

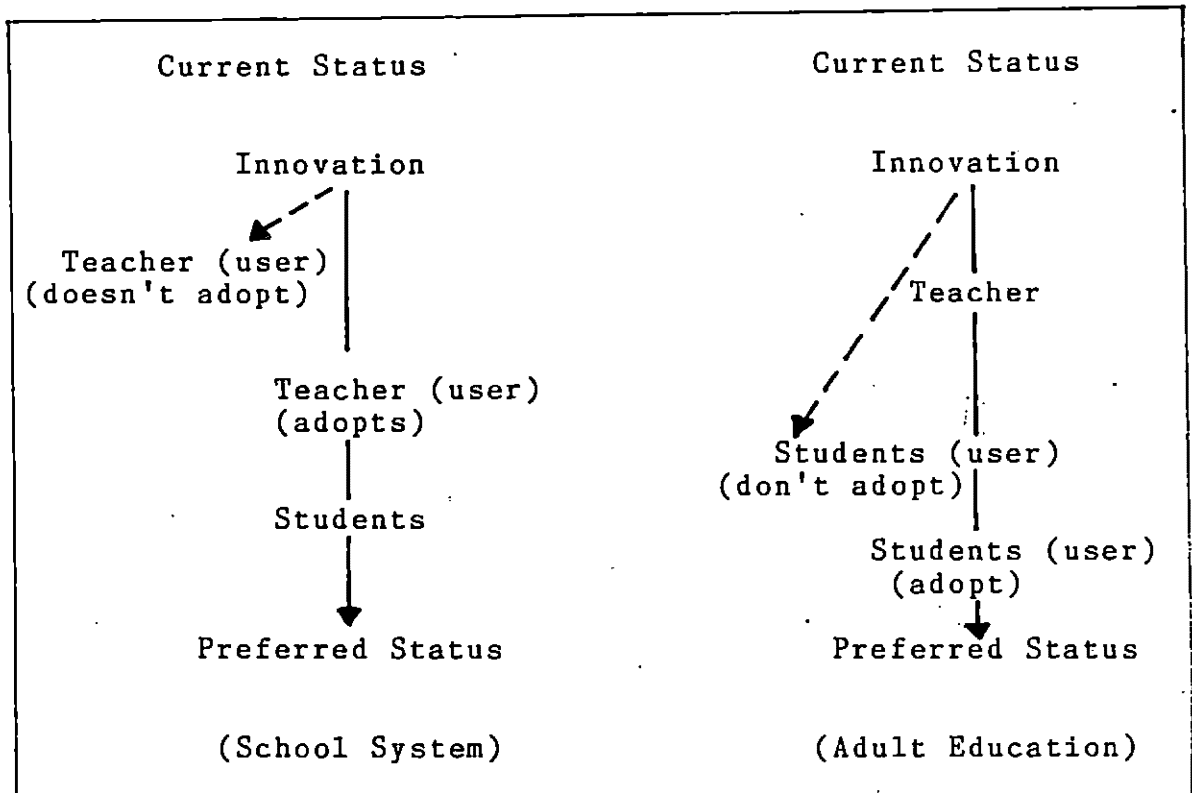


Figure 3. Critical element in implementation process in school systems and adult education.

#### Implementation for Adult Education

By viewing the adult student as the user of the innovation, in a relationship that involves an agency and the innovation itself, a useful framework can be developed. The relationship formed among these elements, as they interact within the greater context of a social and political environment will represent the implementation process (Figure 4) as conceptualized for this paper.

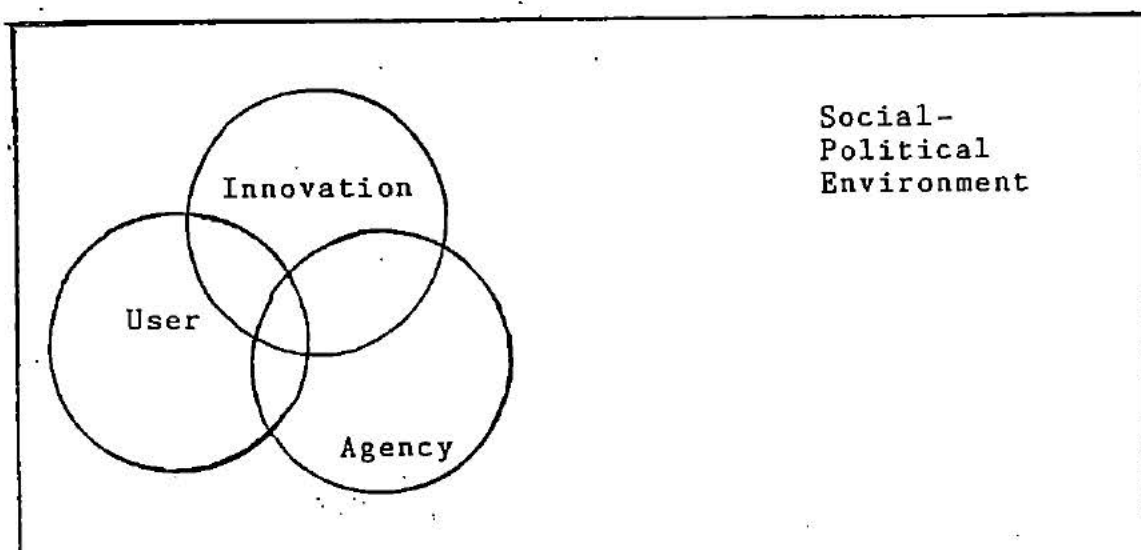


Figure 4. A conceptual framework of implementation elements and their interrelationships (for adult education)

As the curriculum literature construes implementation to be an interaction among the characteristics of the user, the innovation and the agency, so does this study. In order for implementation to be successful, obstacles to the forming of an effective relationship need to be identified and strategies for their removal need to be devised.

Obstacles can be identified by initially looking at each element as an individual feature of the process, then by identifying those features of the individual element which may present an obstacle when forming a relationship with one of the other components, and finally, by viewing the three elements in an integrated relationship which may reveal additional impediments to the process. This

integrated relationship must be examined in light of socio-political context, to determine if additional obstacles can be identified.

Analysis of the component parts and their interrelationships involves three stages.

### Stage One

A complete description of the individual elements is outlined.

#### User

Fullan and Pomfret (1976) see a necessity for describing the characteristics of individuals in the group. For adult education this is also true when one considers factors involved in (Cross, 1974) participation. Demographic variables such as age, sex, educational attainment, occupation and marital status which are most often associated with participation must be identified for members of the group. Deterrents perceived by individual members should similarly be identified. Using factors such as those employed by Scanlan and Darkenwald (1983) in their recent study in continuing education would be suitable. These factors are disengagement, lack of quality, family constraints, cost, lack of benefit, and work constraints. Forty-five items are included.

The users in some cases may also represent a system

(Havelock, 1972) and where this is the case, such characteristics as may distinguish the system should be identified. In a distinct social system members share common beliefs, rules of behavior and values. It is important to understand how these "describe what it means to be 'us' instead of 'them'" (p. 44). If the system is in fact an organization, then one must identify the structure, official policies and resources of the system. These dimensions will logically affect the organization's proclivity to accept the innovation; the corollary is that where norms of the system are violated, resistance may be met.

#### Agency

Characteristics of the agency are important when one considers the ability to deliver the innovation. As with the user group when it is considered to be a system, the agency's unique characteristics need to be identified. Important here too is an understanding of the structure, official policies, resources and common beliefs, rules of behavior and values.

#### Innovation

Where a new curriculum is being proposed as an innovation, it will be necessary to leave the description as a general statement at the beginning of the implementation

process. Adult education program planning should involve the learners (Knowles, 1980) and until the development process is underway with actual learners it would be premature to look at specific learning activities and objectives. More appropriate would be employing only Leithwood's (1980) first dimension of a curriculum innovation, the image or platform. Leithwood (1980) describes this as "implicit and explicit assumptions which form the basis for decisions about what to include in and exclude from the curriculum" (p. 7). Sometimes referred to as aims, these general statements can serve as the basis for more complete descriptions of the innovation as other dimensions are established as important during curriculum development by the users (students identifying needs) and the agency (representatives, knowledgeable in decision making in curriculum development).

### Stage Two

Determination (based on the previous descriptions) of possible obstacles to the forming of a relationship need to be identified. The obstacles are identified with respect to the relationships between components (the user and the agency; the agency and the innovation; the user and the innovation) and with respect to the relationship among the three (user, agency and innovation). This relationship will be viewed in the greater political and social context where

other obstacles may be revealed. Specifically the economic, political and social realities should be examined. Such obstacles may be suggested in the literature as well as from empirical investigation.

### Stage Three

Devising of strategies to overcome any obstacles to full implementation, or in other words, strategies to overcome obstacles which prevent formation of a successful relationship among the user, the innovation and the agency is the final step. Again, the strategies may be gleaned from relevant literature both in curriculum studies and adult education or may be discovered through empirical investigation. Strategies are generally directed at the change agent who is planning implementation.

The framework provides a way of laying plans or devising strategies to overcome anticipated obstacles in order to achieve successful implementation of an innovation in an adult education setting. Successful implementation would materialize as an innovation being adopted by both the agency and the user or in other words a program delivered through the agency and participated in by adult students.

### Definition of Terms

The following terms are used in this study. In each case, the term is given a general definition common in the literature (a). Also given is an illustrative example from the application where it is possible to do so (b).

**Active Unionist** - a union member who participates in the activities of the union including such things as attending meetings, using the grievance procedure, sitting on committees and running for office.

**Adult Education** - the organized educational activities in which adults engage, following a break, in their early formal education. The break is generally the result of entry into the workforce.

**Agency** - (a) the group, individual, or institution planning the educational innovation. For example, a school district, a church, a television station such as Knowledge Network, a University Extension Division or an individual training officer in a plant.  
(b) the University of Victoria Extension Division.

**Change agent** - (a) a person who facilitates planned change; may be, but is not necessarily the same as, the "agency".  
(b) a representative of the University of Victoria Extension Division.

**Implementation** - (a) the deliberate process intended to make the use of an innovation a reality, including the realization of the innovation's goals.  
(b) the process intended to make a Labour Education Program, attended by Union members and conducted by the University of Victoria Extension Division, a reality.

**Innovation** - (a) any program, material or instructional technique or other situation new to the user.  
(b) Labour Education as a program offered to Union members by the University of Victoria Extension Division.

**Labour Education** - a formal program whose overall aim is to encourage an understanding of the role of Union members within his/her Union and role of the Union within

society. . . .

**Participation** - involvement in an institution's formal activities or structure.

**Social-political environment** - those contextual factors (values, economics, politics) which affect the implementation process.

**Strategies** - the plans and methods employed by a change agent to increase the chances of full implementation.

**User** - (a) the persons directly involved in the use of the innovation.

(b) Union members in Greater Victoria as potential students of a Labour Education Program sponsored by the University of Victoria Extension Division.

## Chapter IV

## CONTEXT OF THE APPLICATION

The application of the theory developed to increase participation in adult education involves a labour education program intended for union members in Greater Victoria and sponsored by the Division of Extension of the University of Victoria. This section provides information about the context of such an application. Initially reviewing the general experience of labour education programs in Canadian postsecondary institutions, the section explains the overall situation. Then it specifically discusses important features of the University of Victoria Extension Division and curriculum approaches to labour education.

## Labour Education at Postsecondary Institutions

Labour education programs have been particularly difficult to conduct successfully through postsecondary institutions. While some moderate success has been enjoyed by a few community colleges and University Extension Divisions, more often the tale is one of vain endeavor. The following list provides some examples of both.

.Humber College in Toronto, Ontario, 1980 had a relatively successful ongoing Labour Education Program. After some conflict with the Canadian Labour Congress over content development, organized labour withdrew its support.

- .St. Clair College of Applied Arts and Technology in Windsor, Ontario currently has a Labour Education Program supported by the labour community.
- .University of Manitoba Extension in Winnipeg, Manitoba has worked in co-operation with the Manitoba Federation of Labour to develop a Labour Education Program, currently in operation.
- .Athabasca University in Edmonton, Alberta has worked with the Alberta Federation of Labour for six years. In the fall of 1983, it offered its first Labour History Course. It is difficult to measure success of the course at this time, but previous plans to conduct a comprehensive program are still in abeyance.
- .Grant MacEwan Community College in Edmonton, Alberta offered three Labour courses, developed in co-operation with the labour community, in the fall of 1981. One course (Labour Legislation) attracted sufficient registration to proceed that term. In the spring and fall of 1982 it was offered again but was cancelled due to lack of interest as indicated by insufficient registration.
- .Capilano College in Vancouver, B.C. offered some Labour courses in 1980. The labour community was not involved to their satisfaction in the planning and refused to support the courses.
- .Simon Fraser University has a successful relationship with the labour community. While the University does not conduct a Labour Education Program, the Continuing Studies Division has a Director of Labour Programs who works with labour unions and the Federation in their own programs. The University co-sponsors conferences and schools.
- .University of Victoria, like many postsecondary institutions not specifically discussed here, has made many overtures to and worked on many occasions with labour representatives to develop a program. To date, no program has been developed.

The task of developing successful labour education programs at postsecondary institutions is problematic, but it has not been abandoned. It is, in fact, recognized by many Canadians in both Education and Labour as a valuable endeavor for several reasons.

Firstly, a dynamic labour education program may attract participants from a group of heretofore non-participants in formal education, namely blue collar workers. Study after study on the demographic variables associated with adult participation in formal education (Johnstone and Rivera, 1965; Cross, Valley and Associates, 1974; Waniewicz, 1976; Boshier, 1977) indicates that there is a persistent social class bias in favour of the educationally privileged middle class. Other studies have shown a marked increase of participation of blue collar workers where labour education is among the offerings (Gray, 1976). Attracting such participants is congruent with the public service objectives of a University. It is additionally an important step towards the democratization of adult education, a goal of many in the field (Kidd, 1979; Jones, 1980).

Secondly, as the area of labour relations becomes more sophisticated, union members have an ever increasing need for education in order to deal with problems as responsible members and citizens. The Federal Department of Labour (1982) has pointed out that programs currently offered by

educational institutions are "inadequate to fully prepare workers for their roles as union members, officers, or specialists [or to] give them an understanding of the importance of unions in our labour relations system." With close to thirty percent of the workforce unionized, with more sophisticated legislation being introduced yearly and with such far-reaching trends as technological change on the books, education for members of unions has never been so important.

Thirdly, a successful, ongoing labour education program would be mutually beneficial to the Institution and the Labour Community. J. Roby Kidd (1975) told delegates at a National Conference on Labour Education that:

Institutions can serve labour, but they also need the ideas and support of union members about what constitutes a relevant education . . . freeing education from some of the shackles of privilege, vested interest and barriers of IQ's, credits and other pedagogical impediments. (p. 14)

At a time of economic constraint, when Universities can ill-afford an "Ivory Tower" reputation, greater opportunity of access must be pursued (Guinsberg, 1981). A supportive labour community would go far to broaden the University's base of support.

The same economic constraints are straining the resources of unions. Providing education to members is an expensive pursuit. Surely extending those resources by co-operating with postsecondary institutions to develop programs for union members would be viewed by unions as a

positive move. Herbert Levine, Director of Labour Studies at Rutgers University, in his address to the National Conference (1975) said:

It would be a travesty of justice to expect that representatives of workers, functioning on dues dollars of workers, should attempt to meet the vast educational needs of workers out of their own resources. (p. 60)

Planning a labour education program, then, is an important endeavour. Since it has historically been a problem area, it additionally will provide a useful example for the application of implementation in the planning of an adult education program.

#### Division of Extension University of Victoria

As the agency sponsoring the labour education program, aspects for consideration which are important to the application are those dimensions of description: structure, policies, resources, and values and beliefs. Much of the information required to complete the description was available through personal interviews but there are published works which provide an initial source of information which will be reviewed here.

University Extension is the arm of the University of Victoria which provides adult education services. Responding to the official public service goal of the University, the Division of Extension offers programs in the areas of: general non-degree, specialized non-degree,

evening credit and off-campus credit. Devlin (1980) describes the function of extension as historically "marginal". Characteristic of a University Extension Division are its structural looseness and minimal funding which Devlin claims to be largely due to the ubiquitous nature of "public service" as an official rather than operative goal (Devlin, 1976). At the University of Victoria, "the structural and personnel capacity to provide adult education services is a relatively recent phenomena" (Devlin, 1984, p. 36). Basically the policy of the Extension Division is based on a principle recommended in the Report of the Commission on Academic Development in 1972:

That academic offerings of the University of Victoria should be available for and of service to the broadest possible spectrum of the whole community of which the University is a part. (in Devlin, 1984, p. 26)

While participation in non-credit programs accounted for the majority of individuals served by universities in B.C. in 1975-76, only 1.2% of the total budgets of the three universities was allocated to their support (Devlin, 1984).

It would appear that while in principle the University sees it has a role in providing adult educational services, in practice it is not yet largely committed to the area.

## Approaches to Labour Education

Labour education has been defined as a program whose broad objectives are to help union members to understand their role in the union and the union's role in society. In Canada, the Labour Movement has traditionally been the provider of the labour education of its members. It is only recently that postsecondary institutions have been seen as a logical agency for conducting such programs. For a postsecondary institution a curriculum in labour education would be an innovation. The issue important to review in this regard is an appropriate philosophical stance from which to develop a curriculum.

Where labour education has become an established curriculum in postsecondary institutions it has been conceptualized in essentially the same forms as other areas of adult education. Elias and Merriam (1980) outline five orientations which describe the philosophical foundations: education as an academic pursuit, education for social reconstruction, education for social adaptation, education as a humanistic force, and education as a cognitive process. The experience in the United States, where there is a long tradition of institutionalized labour education illustrates that four of these main philosophical approaches have or are being taken to labour education curricula.

The latest trend in the United States is towards the academic rationalist or liberal studies approach to

curriculum. Seeking to "raise laboring men (rarely women) above their mire of ignorance and frustration to take them to new educational heights" (Schachhuber, 1979, p. 148), these educationalists are establishing Labour Studies Degree Programs. These programs offer courses in Labour History, the Sociology of Work, Economics and Literature. Lois Gray (1976) has suggested this trend may reflect the influence of consumerism, with college credits and degrees being considered a consumer good. Others argue that the status of studies in labour is equally that of any discipline, "can join other disciplines hanging on an appropriate branch of the tree" (Boyle, 1976, p. 160) and thus deserves a place in academe. Whatever the impetus behind this growing trend towards academic rationalism in the United States, it is often a point of contention among labour educators.

Lieberthal (1976) articulates the argument:

non-credit, problem oriented programs offer as much or more insightful educational experience for workers [as degree programs] and avoid the necessity of labeling people as bright or not bright with a grading system (p. 245).

He goes on to say academized labour education will only "serve the middle-class, upwardly mobile" (p. 244) and will become less relevant to unions by conforming to strict institutional requirements.

The roots of labour education are grounded in the Socialist Movement which arose out of the Industrial Revolution (Peters and McCarrick, 1976). Social activists

in the United States, who established institutions for Workers' Education as it was often called, were "primarily interested in educating and mobilizing the labour force for social change" (Dwyer, Galvin and Larson, 1979, p. 117). Courses were intended to raise the level of awareness of the working people with hopes of restructuring the social order and ushering in a more just society (Dwyer et al., 1979). Such noble causes met with much approval during the economic upheavals of the 1920's and 30's. Labour Education for social reconstruction is not found in most American colleges or universities today. Bricker (1976), in fact, specifically argues that postsecondary institutions, by allowing themselves to get involved in the political aims of unions, risk the ire of business groups, university administrators and "latter day Joe McCarthys" (p. 63).

The more practically oriented advocates of social justice were able to secure a lasting place for labour education in many American universities and colleges. These moderates saw the approach to be one of social relevance. Based on the opinion that if unions are to exist, and if workers are to run them, then workers should have access to an education which teaches them how to operate within that system, labour education from this orientation is practical. It promotes the effective use of grievance procedures, collective bargaining techniques and the use and role of parliamentary procedure. Those who are involved in this

education see their purpose as being "relevant by providing practical union skills training" (Schachhuber, 1979, p. 148). Many American colleges and universities offer this variety of curricula.

Another common approach is where labour education is seen as a humanistic force. The success of such a program relies on experientially based activities, tailored to the needs of the organization and its members (Roberts, 1975). Advocates of this approach emphasize the need to work directly with the labour community in a spirit of co-operation (Whitehouse, 1977). They refer to a teaching/learning style that involves problem centred discussion (Roberts, 1976). This approach conforms to Knowles' (1980) essentially humanistic view of adult education where the interests and needs of the learners are central to the educational experience.

It is from the proceedings of a national conference on Labour Education that one can determine, to some extent, how a curriculum for a Labour Education program in a Canadian postsecondary institution should be approached. A National Conference on Labour Education was held in 1975, bringing together unions, universities, community colleges, and representatives from government. The purpose of the Conference was to "examine . . . the role that the labour movement should play in the design of courses for working people, the priority given to such courses in Canadian

colleges and universities and the kinds of subjects that should be taught in labour education programmes" (p. 2). It is clear from the remarks of Julien Major, Vice President of the Canadian Labour Congress, that content of the program should not duplicate courses already being taught by unions and their federations. In other words, "practical courses, for example on training union representatives, the administration of a union local, collective bargaining and so on" (p. 24) should not make up the content of a program. Equally explicit are the remarks of Gilles Frenette, Director of the Education Branch of the Confederation of National Trade Unions in relation to methodology or "pedagogical approach". "The workers have to be their own professors" (p. 26). He admonishes those "who believe that labour education is composed of flowery speeches and well-prepared seminars given by the best university professors" (p. 26). Pedagogy in labour education should not duplicate the dependency structure of the employee relationship at the workplace.

In selecting a philosophical approach for a labour education curriculum in Canadian postsecondary institutions, one must consider the stand of the organized labour movement. Policies presented at the National Conference eliminate as suitable, the most widely accepted approaches to labour education as an academic pursuit and for social adaptation, which are common in the United States. The

indication from this information is that the remaining two approaches, that is, education for social reconstruction and education as a humanistic force, would be suitable from the point of view of the Canadian Labour Movement. More specific information about the actual user population and the agency are required before a choice can be made. A description can be bound under "Labour Education as Innovation" in Chapter VI.

Regardless of the curriculum approach, most of the authors writing about labour education in postsecondary institutions, speak to the necessity of cooperation between labour and institutions in setting up a program. Ferris (1978), Roberts (1975), Whitehouse (1977), and Lieberthal (1980) each mention the setting up of advisory committees. MacKenzie (1980) more specifically outlines the necessary conditions. "University and colleges have to provide some measure of autonomy to a labour education program . . . the program must be flexible in setting fees, planning and developing courses, preparing the budget, selecting the faculty and administering its courses . . . (p. 213). He continues to say that a program director "should have a good understanding of trade unions, their structure, functions, needs and politics and should be acceptable to the trade union leadership . . . as well as to the university." (p. 213-214).

Among the problems identified by those writing in the

area of labour education in postsecondary institutions is that of funding (MacKenzie, 1980). Solutions to the problem are sometimes seen as a review of policy within an institution, rearranging priorities and structure. This is especially so where community education (therefore labour education) is expected to operate on the basis of cost recovery, and is seen as lower in status than the traditional academic offerings. Other solutions look to outside sources. Social policies like "Paid Educational Leave", and government placed training levies on sizeable industrial and business concerns are often recommended. Learning a Living In Canada (1983), a publication of the federal government, outlines these policy options recommended as a result of a Task Force on Skill Development Leave. An example of a Paid Educational Leave scheme for labour education has been negotiated by the United Auto Workers.

The next section will outline sources of information outside the literature which will be required for the application.

## Chapter V

### METHOD FOR THE APPLICATION

#### Overview

This section describes in detail how the general implementation theory developed in Chapter III was applied to the specific circumstance of planning a labour education program for union members in Victoria to be sponsored by the University of Victoria Extension.

This section includes: (1) a description of the information gathered in order to determine the essential features of the user, the agency and the innovation, (2) sources of information for the descriptions, and (3) methods of identifying obstacles to participation and criteria for selecting strategies.

#### Describing the Elements

##### User

The users, Union members in Greater Victoria, are described firstly as a "system" because Unions operate as part of an organized structure, and because, as a social group, some common values and beliefs are held. As a system then, a description is built around four dimensions: Structure, Policies, Resources and Common Beliefs or Values.

Structural considerations include: Who are the

leaders?, What is their influence? and Is there an important protocol to be recognized? It is necessary to provide answers to these kinds of questions in order to avoid offending important patterns of the system. Equally important, a knowledge of structure makes communication more effective and expedites decision making by identifying the key people.

For the purposes of this study, because there is an operative policy with respect to Labour Education programs in postsecondary institutions, Policies are treated as a distinct dimension of the user system.

Resources are described in terms of finances, time, and personnel which could, in some cases, present obstacles to implementation, and in others, contribute to a strategy for implementation.

Havelock (1973) discusses the "norms" of the user group as the shared beliefs, values, and rules of behavior. It is important to understand how these "describe what it means to be 'us' instead of 'them'" (p. 44). If these norms are violated during the implementation process, failure may result. The "Common Beliefs and Values" is an important dimension of the user system.

In addition to a system, the users are described as individuals comprising that group. The dimensions to be considered in this description are those demographic variables most often associated with participation in formal

education programs: sex, age, marital status, educational attainment, occupation and past participation in adult education. Other factors which have proven to be useful in understanding participation behavior in adult education are identified by using a list of items described as obstacles to participation (Cross, 1974).

### Agency

As with descriptions of the user, the agency is described as a system. Consequently the same dimensions are appropriate and are used to describe the agency. Again, they are Structure, Policies, Resources, and Common Beliefs or Values. In a discussion of non-traditional programs, Cross and Associates (1974) provided an inventory of Institutional Resources. This inventory was compiled for the purpose of assessing the institutions's ability to respond to the non-traditional needs and interests of potential adult learners. As labour education can be considered non-traditional in that it focuses on an audience not traditionally known to participate in adult education, this inventory provides the basis for collecting information about the Structure and Policies of the agency for this study. Structure is discussed in terms of locus of decision-making, organization of administration and procedures for initiating and administering programs. Policies which affect academic standards, prerequisites, course delivery and development, recruiting instructors and

use of institutional facilities are identified.

Resources are described in terms of finances, time, and personnel which would have obvious implications for implementation.

### Innovation

As was previously explained, the innovation in this study is a curriculum and consequently does not lend itself to a complete description in its early stages. Rather, to conform to principles of adult education planning (Knowles, 1980), development of curriculum and thus the important dimensions for description would be postponed until a working group of users and representatives of the agency could be formed.

For this study, an overall aim or general statement of an acceptable approach to the development of a labour education program has been established.

### Contextual Factors

Contextual factors are described under Social, Economic, or Political dimensions. These are relevant when the approach proceeds from descriptions of the individual elements to the identification of obstacles which would or may be encountered in the forming of a relationship. For an example, an antiunion animus may be prevalent, representing a social reality. One would have to investigate the consequences of that reality when attempting to form a

relationship between a public institution and members of organized labour.

#### Sources of and Procedures for Obtaining Information User

In order to establish the characteristics of the labour community as a system, three labour leaders from Victoria were interviewed (Appendix A).

Individuals selected from organized labour in Greater Victoria as a representative sample (see Appendix B) were surveyed to determine the status of demographic variables associated with participation: sex, age, marital status, educational attainment and experience, and occupation. They were asked to identify factors which might prevent them from participating in a labour education program (Appendix C). The instrument was constructed from questions designed by Cross, Valley, and Associates (1974), for an American National Survey, as well as from an item on barriers taken directly from Labour Education in Alberta: An Assessment of Activities, Needs and Preferences, which was developed by Athabasca University.

#### Sampling Procedure

While the total union membership is a comparatively large portion of the adult population of Greater Victoria, the number is misleading when considering potential users of a Labour Education program. Many of these members hold membership simply by virtue of their employment situation.

Where Unions have negotiated a "Closed Shop" or the Rand Formula, individuals have no choice about belonging or not to that Union. Many are at best neutral or more often hostile towards Unions. To include these members as part of the potential users would be a serious mistake.

More realistically, it is the active union member who should be identified as the potential user. "Active" in this sense may be described by viewing Union activity along a continuum. At the far left is the activity of paying dues, the very minimum (and usually compulsory) activity. In the middle are the activities of voting on a contract proposal, using the grievance procedure to resolve problems and reading Union correspondence. At the extreme right is running for the top office of the Union. Active unionists for the purposes of this study are those who participate in activities towards the right of the continuum. They attend meetings, act as Union Stewards, participate in the Collective Bargaining Procedure and administer the affairs of the Union or its Local.

Rogin (1970) estimates the active membership of Unions to form 10% of the total in the United States. Personal experience would view this figure as relatively high but for a province such as British Columbia where unionism has a relatively long and militant tradition and a large proportion of unionized workers (Labour Directory, 1983) it may be realistic.

Using this definition and figure for the Greater Victoria active Union Membership puts the total population at 1858 members.

In order to be representative, active members from the three major categories of Unions were surveyed, that is Public Sector, Industrial/Commercial and Construction. Populations break down respectively to 1287, 271 and 298 (Appendix B).

Active members were reached by circulating surveys at meetings and at local union offices. The sample was originally planned to be comprised of locals as shown in Table 5.

Table 5

Sample of Union Membership in Greater Victoria

Union	No. of Members	No. of Locals
Public Sector		
BCGEU	120	4
CUPE	50	3
Industrial Sector		
IWA	30	1
USWA	20	1
TWU	50	1
Construction Sector		
Carpenters	30	1

### Agency

The information required to describe the agency was gathered through interviews with two University of Victoria Extension Division Personnel. A modified version of the national survey on non-traditional programs (Cross and Associates, 1974) was used (Appendix D).

### Innovation

An overall aim and general approach for Labour Education as a curriculum was established from the information provided during interviews of the personnel from the labour community and University Extension.

### Obstacles and Strategies

Having described each element in detail, the process continues by viewing each of the elements in turn in relationship with one of the other elements. Specifically the users and the agency, then the user and the innovation and finally, the innovation and the agency were viewed together. What obstacles may occur when union members from Victoria are seen as potential learners at University Extension? What obstacles may occur if labour education becomes an offering of University Extension? What obstacles may occur when labour education is offered as a course of study for union members?

Obstacles were identified from relevant literature,

practical experience of those involved in similar endeavours in the past and from logical deduction. Personnel from postsecondary institutions, namely, University of Manitoba, University of Victoria, Simon Fraser University, Athabasca University, Grant MacEwan Community College and St. Clair College of Applied Arts and Technology were interviewed to ascertain obstacles encountered and strategies employed in their experience. The corresponding Union personnel involved in the planning were also interviewed (Appendix E).

Strategies which would be effective in removing or ameliorating obstacles were then devised. Strategies were discerned from literature, practical experience and logical deduction.

When devising strategies, only those which conformed to the following criteria were considered:

1. The strategy must be practicable.
2. The strategy must be consistent with societal mores.
3. The strategy must be consistent with sound educational practice.

Although a plan to remove an obstacle may result in full implementation, if the plan were to offend any of these criteria, then the quality of the result of implementation would be questionable.

## Chapter VI

## APPLICATION OF THE THEORY

## Overview

This section reports on the results of the application of implementation to Labour Education at the University of Victoria Extension Division. It describes in detail, from the data collected, the Labour Community as a system and as a collection of individual unionists, the University of Victoria Extension Division, Labour Education as an innovation, and the socio-political context. At this stage, the implications of the findings are sometimes alluded to but are not specifically dealt with.

Having described the elements, each one is viewed in a relationship with one of the others, in order to identify obstacles. In other words, questions such as: What problems may arise when the Labour Community is seen in a potential client relationship with the University of Victoria Extension Division, given the detailed descriptions of each?, are answered. It is here that the implications of the findings are made explicit.

A list of specific obstacles identified from the analysis are enumerated. These obstacles are subsequently dealt with by way of strategies devised to overcome, avoid or ameliorate them, the substance of which completes this section. Strategies are the suggested measures which a change agent may take to increase the likelihood of

implementation.

## Description of Elements

### Labour Community

The labour movement is organized as a group sufficient unto itself. The organization has a structure, leadership, policies and objectives which guide its activities. Its members provide the financial support and set its course. At the same time, the labour movement, realistically, is in no way a monolith. It resembles perhaps a large family of assorted members who are at times in conflict with each other, but who are, in the final analysis, united when threatened by some outside force. Each member union has its own structure, leadership, policies and objectives and it consequently is not unusual for member unions to be at variance with each other and with the parent organization from time to time.

There are, however, two kinds of circumstances when the labour movement pulls together. The second of these will become an important reality for consideration in this study. The first circumstance which results in a united front occurs when all or many of the member unions are being, or perceive they are being, threatened. A dramatic example of the effect of such a widely felt menace was the creation of "Operation Solidarity" in British Columbia in the summer of 1983. "Operation Solidarity" was formed in

reaction to the Social Credit Government's unpopular policies of restraint and drastic changes to labour legislation. It united trade unionists from public sector, industrial and construction unions from within and outside of the formal labour movement with social activists from many other groups, in an effort to change the Government's plans. Collaboration of this sort is seldom seen. The only other times when collaboration on a large scale is evident is when member unions feel a common need or are facing a common problem. Such issues as Technological Change, Equality for Women, Occupational Health and Safety, and Environmental Concerns, though not as dramatic as the immediate threats met by labour, are nonetheless seen as issues around which unions share time, personnel and other resources to arrive at plans for common action. Evidence for this type of collaboration can be found in jointly sponsored conferences, in the use of Joint Committees, and in objectives of Federations of Labour, Labour Councils and the Canadian Labour Congress.

As with any large family, there are many jealousies felt among the members. One that has been publicly aired, namely the dissension between industrial and public sector unions, is particularly strong. This study makes no attempt to trace the historical development of the labour movement nor to analyse the root of its internal problems but it is important to note some points in order to at least partially

understand existing antagonisms. Industrial unions have a long tradition in the labour movement. They can trace their history back to days when unions were illegal. They fought to get themselves organized originally and continue to fight to organize members in new plants and shops. They are currently finding themselves with drastically dwindling memberships because of plant closures and layoffs. The International Woodworkers of America (IWA) provide a good example. A decline of 9,243 or 22% of the membership was experienced over 1983 due to the economic recession (B.C. Labour Directory, 1983). Such a huge loss in dues revenues is a strain on the organization.

Public sector unions, on the other hand are relatively new to the labour movement. The right of unionization of most public sector unions was won through the natural evolution of labour relations in Canada, rather than through the sometimes bloody struggle engaged in by the industrial unions. Since their arrival on the scene, the Rand Formula has become a popular concept under which most public sector unions operate. Under the Rand Formula, employees are obliged to pay union dues if they are benefitting from the conditions of a union contract. Most government employees within the scope of the bargaining unit pay dues to the union even if they choose not to become members. The "Closed Shop" is now an accepted idea and many unions have the advantage of requiring membership in the union as a

condition of employment. Until very recently, public sector employment has been growing rapidly. From 1965 to 1983, union membership in British Columbia almost doubled. This is due almost entirely to the widescale organizing of public sector employees in such unions as the British Columbia Government Employees Union (BCGEU) and the Canadian Union of Public Employees (CUPE) (B.C. Labour Directory, 1983).

Public sector unions are now the largest in Canada. They are financially comfortable unlike their industrial counterparts who are dealing with lost memberships through plant closures. They now hold the power in the labour movement and as they are the "Johnny-Come-Lately" on the labour scene, they are often resented. This is an oversimplification of the problem as there are additional ideological differences but is mentioned here as a partial explanation of obstacles which may present themselves when planning a common education program for unionists. Other jealousies arise between national and international unions and between construction unions and the industrial and public sector unions. In 1982, the construction unions withdrew from the Canadian Labour Congress. Their withdrawal resulted in the formation of the Canadian Federation of Labour (C.F.L). This change in membership in the Canadian Labour Congress increased the dominance of public sector unions in the remaining balance of power. These examples illustrate the point that the labour

community as a system is not an entirely cohesive group. This fact will have many and serious implications for a change agent working with the community.

Labour representatives are proud to describe educational programs designed and delivered by the labour movement to its members. Education is a matter given considerable attention by some unions, particularly those with great resources. These unions often have full time paid staff hired to implement programs and conduct regular educational activities for its membership. Other unions rely on the central bodies such as the Canadian Labour Congress (CLC), British Columbia Federation of Labour (B.C.F.L.) and Local Labour Councils to provide education on a less regular basis. The Victoria Labour Council has an annual weekend Institute, for example and the CLC and B.C.F.L. conduct four consecutive weeks of residential programs each year. Certainly, educational opportunities vary considerably for different unions. Among the most important reasons for such differences is the variation in financial capacities among the unions. Education, an expensive pursuit in any instance, is especially so for the organization, in this case the union which undertakes to reimburse any member for lost wages incurred through participation in an educational activity. Many union locals can simply not afford to sponsor members to attend a week-long course, or to provide a one-day seminar for twenty

shop stewards. This is not a matter of education being a low priority; it is rather a matter of financial impossibility. Scarce resources must often be funnelled into contract negotiation and enforcement. Both activities are very costly, often requiring the hiring of lawyers; there is little left over for other priorities no matter how high on the list they may be.

In order to gather specific information which could be used as the basis for a description of the labour community, interviews were conducted for this study with the following official representatives of the labour community: Noel Stoodley, Regional Director Educational Services, Canadian Labour Congress; Jack Groves, Past Secretary-Treasurer, Victoria Labour Council; and Andre Pel, Secretary Treasurer and Chairman Education Committee, Victoria Labour Council. The interviews were semi-structured in order to answer the specific questions as outlined in Appendix A but informal enough to include other details thought to be important by the officials. Information was collected around the dimensions of Structure, Policies, Resources, and Values and Beliefs (Appendix A).

### Structure

The Canadian Labour Movement is organized along lines similar to the structural pattern of government. The major national organization in Canada is the Canadian Labour Congress. In each of the ten provinces there is a

Provincial Federation of Labour chartered by the CLC. In many cities and communities, local Labour Councils are chartered by the CLC.

The CLC is described by labour representatives as a "union of unions". It is primarily a service organization and is composed of organizations who join the federation on a voluntary basis. These organizations finance the CLC through dues based on the size of their memberships. Policies are set by the members at biennial conventions. One of the major services offered by the CLC is an extensive education program. The program has been extended considerably since 1976 when Labour Canada provided a sizeable (\$5,000,000) grant to create the Labour Education and Studies Centre. The grant has been renewed once since then allowing each region a continuing high level of activity. In British Columbia the grant monies have been used to provide subsidization of the week-long residential schools sponsored by the CLC and B.C. Federation of Labour. The grant also makes it possible to have additional staff working in the area of labour education.

The B.C. Federation of Labour works provincially in much the same way as the CLC does nationally. Its policies are set at annual conventions and its role is primarily to unite the organizations in matters of common interest. Education again is one of the areas with which the central is concerned. In British Columbia, where the CLC has a

large staff and responsibility for the province, the Provincial Federation works with the CLC in all its educational endeavours and has no staff person assigned solely to that function.

The Victoria Labour Council is a federation of unions in the Victoria area. The Labour Council concerns itself with matters of local common interest. The Council has an education committee and plans an annual labour education week-end. It relies heavily on the CLC Regional Director of Educational Services and refers all major decisions, in the area of education, to the Regional CLC Office.

While a change agent would probably work directly with the Labour Council, it is wise to note that authority is left in the hands of the CLC Education Director. It is possible to lay ground work by talking to individual unions and the Labour Council Officers but real decisions would be made by the CLC. It is apparent from the interviews that in British Columbia, in the area of labour education, the CLC Education Director wields the power.

### Policies

The Canadian Labour Congress has a specific policy with regard to labour education and postsecondary institutions. The policy is directed primarily to Labour Councils as they are the most likely body to be working in a project with a postsecondary institution. The policy was articulated by Julien Major, Vice-President, CLC, in the

National Conference on Labour Education in 1976 and continues to be expressive of the views of labour leaders.

It is quoted here from Major's address to the Conference:

(1) Labour councils should investigate the exact courses offered to regional unions. (2) The labour council, before approving any of these courses, should consult the education service of the Canadian Labour Congress, and those of the Federation, as well as the union representatives responsible for education in the labour council's district. (3) The labour council and the institution should work jointly to form an advisory committee representing the bodies affiliated to the labour council. This committee would discuss with the institution course content, instructors, and any other matter involved in setting up a program. (4) The labour council and the advisory committee should persuade postsecondary institutions not to organize "practical" courses, for example on training union representatives, the administration of a union local, collective bargaining, and so on. This is done in the United States, but we do not want it to happen in Canada. These subjects are dealt with not only at labour council study weekends and the CLC summer school, but also at education conferences held by affiliated unions and federations. Finally, we also attach great importance to the choice of instructors, and we feel that institutions will agree to union instructors teaching certain courses. (p. 24)

As a general policy, the labour community responds best to proposals where their active participation is genuinely required. Consultation and negotiation are rights unionists have fought for in the workplace and are a natural process expected where they meet with others on an equal basis. All labour representatives interviewed specifically indicated that this spirit of joint deliberation was a requisite.

## Resources

There are currently, within the structure of the labour community, some full-time staff officers whose primary role is to provide labour education for members. In addition there are full-time elected officers who have a great personal interest in education. Of special note here is the enthusiastic response of the new Secretary Treasurer of the Victoria Labour Council to this study. Andre Pel, who has additionally taken on the role of Chairman of the Education Committee because of his enthusiasm, sees education as one of the highest priorities of his office. Interest or enthusiasm do not necessarily translate into time, however. All union officials find themselves pulled in several different directions at once and it is impossible for them to devote all their time and energy to one project. Even full-time education staff find themselves manning picket lines, organizing Convention details or working on election campaigns when the needs of the organization require it.

There is no simple answer to the question, "Are there people in the system who have time to devote to an educational project?" The answer is yes and no. There are people who have the interest and they sometimes have the time or at least some time. This time may be fragmentary and interrupted by any crisis situation.

Funds available for the education projects are

uncertain. Representatives from the centrals cannot speak for the affiliates. It is conceivable that some unions may sponsor members who showed an interest in an outside labour education program of which they approved. It is similarly conceivable that some unions may be willing to hire the consultation services of the University. Some unions have building space which they may make available for the delivery of an educational program. Some unions may be willing jointly to contribute start-up funds.

Those persons interviewed suggested several possible ways in which unions may be able to make a financial contribution to a labour education program sponsored by an agency outside of the movement. While they could not speak to the actual materializing of these resources, they were certain of one point. Unions feel that postsecondary institutions have traditionally provided education for management. They are not willing now to "go the extra mile" by contributing more than any other interest group could be reasonably expected to contribute in order to have a public institution serve their needs.

Additionally, all unions to some degree are feeling the economic recession through lost dues revenue. Their always limited resources are under greater strain than ever. Collective bargaining is entering a period of great difficulty. Economic recession always puts a strain on the process and high unemployment gives the employer the upper

hand. Unions at such a time feel compelled to preserve all their resources for the collective bargaining process which may result in strike or lockout.

Communication is another important union function which demands resources. Much of the scant resources of unions go towards providing regular newsletters, bulletins or actual newspapers. These unions are happy to make the communication network available for announcing projects which are worthwhile for the membership. The Labour Council regularly sends minutes of its meetings to the affiliates. Representatives have indicated a willingness to include announcements in these mailouts. Many unions are unwilling to provide outside organizations with membership lists but will include information from other organizations in their own bulletins.

If the experience of this study is an indication, it is also possible for a change agent, for instance, to be invited to address members during regular meetings of the Union Local. In addition, it is possible to attend a meeting (or meetings) of the Labour Council Education Committee. Where a working relationship has been established, it is also possible to be granted a permanent seat on a central body's Education Committee as is the case with Simon Fraser University and the British Columbia Federation of Labour Education Committee.

### Common Values and Beliefs

Labour education is not intended for the individual's improvement or growth but rather for the growth of the organization or movement. One labour representative who was interviewed had recently attended a national meeting of labour educators and was able to report on the views expressed at that meeting. Canadian labour leaders are afraid that the American experience, in which labour education has become an academic pursuit where individuals are encouraged to climb the ladder of academe, or where labour education means no more than training leaders to do their job, will be replicated in Canada. Neither of those approaches is what the Canadian labour movement see as the ideal. Firstly, according to the interviewee, labour education in Canada should have as its objective, a desire to make better trade unionists. Good labour education is ideological in character, intended to bring about an understanding of society, the class structure and a union's role therein. Labour education should follow the cooperative model where students work together, aiding each other, collectively progressing for the good of the movement, not the individual.

Secondly, Canadian labour leaders feel strongly that the education offered to the members should come under the direct influence, if not control, of the labour movement. There is genuine (and warranted from some experiences) fear

that programs offered by outside organizations such as universities, under the broad title of labour education, may in fact be nothing more than academic paternalism at best and thinly disguised antiunionism at the worst.

Part of this stance is based on misconceptions many members of the labour community have about Universities. Most unionists have had little direct experience with universities. The university is seen by some as an arm of the government under the government's direct control and therefore simply passing on the current course set by the government. By others it is seen as an essentially conservative establishment with no genuine interest in working people. Still others see in universities an extreme bias in favour of a management point of view. While these are the more extreme views and are not completely representative of the entire labour community, they serve to point out a common underlying fear or more often a skepticism or suspicion of a university interested in labour education.

### Summary

The labour community has a complex structure, further complicated by internal political disputes. There is a strong policy with regard to labour education and postsecondary institutions which demands a high level of labour control over curriculum and instructors. Unions are

experiencing financial constraints but have some limited resources such as communication systems, building space, and personnel experienced in the area of labour education. The labour community views universities with some suspicion. Labour education is considered to be education which is explicitly ideological and which is aimed at furthering the labour movement, not the individual.

The general attitude expressed by representatives of the labour community toward a labour education program sponsored by the University of Victoria Extension was one of genuine interest. The co-operation and assistance extended for this study was tremendous and augurs well for any actual attempt to plan labour education programs.

#### Union Members

Surveys were distributed to unionists during the period of January 15 to February 15, 1985, in Victoria by the Local Union representatives. Representatives (Local Presidents or Staff) agreed to ask members attending meetings or dropping into Union offices on union business to complete the surveys while they were there. This distribution through Unions resulted in a relatively high rate of return (Table 6).

Table 6

Survey Distribution and Rate of Return (Unions)

Union	No. Surveys Left With Representative	No. and Percentage of Surveys Completed
BCGEU	125	87 (69.60%)
CUPE	60	40 (66.67 )
IWA	35	24 (68.57 )
CARPENTERS	30	18 (60.0 )
TOTAL	250	169 (67.62 )

Given this high rate of return, it was clear that the membership from the BCGEU, CUPE, IWA and Carpenters comprised a representative sample of active union members in Victoria. Original plans to canvas two other unions (Telecommunication Workers and United Steelworkers of America) were abandoned because they would have made the industrial representation disproportionate (see Table 8).

Additionally however, surveys were distributed via the Labour Council and at the CLC Labour School at Harrison. There is no way to identify the union from which the surveys came, nor even their exact origin, as some were mailed back. The rate of return was not as high as the direct union distribution (Table 7). The total sample is comprised of one hundred and ninety-three respondents, representing a sixty-four percent rate of return.

Table 7

Survey Distribution and Rate of Return (Labour Council and CLC Labour School)

No. Distributed	No. and Percentage of Surveys Completed
50	24 (48.0%)

The actual sample obtained through the two methods of survey distribution is a good size (193) but unfortunately not entirely representative. Using only the surveys which could be identified by unions, one can see the proportion of public sector, industrial sector and construction sector response is not equal to the proportions in the described population shown in Table 8. There is no reason to believe that the additional twenty-four unidentifiable surveys would change the disproportionate nature of the sample.

Table 8

Proportionate Representation of Population and Sample  
Identifiable Union Sector

Sector	No. in Population and % in Population	No. in Sample and % in Sample
Public	1287 (69.34%)	127 (75.15%)
Industrial	271 (14.60 )	24 (14.20 )
Construction	298 (16.06 )	18 (10.65 )
Total	1856 (100%)	169 (100%)

The major problem is with the construction sector representation and this may in fact be more reflective of the actual situation than the arbitrary figures established by simply calculating 10 % of the total membership as the active component. Construction workers are of necessity often travelling to find work. While the membership, based on dues paying members, may be high, many of these members

are unemployed or have left the province to find work. These people continue to pay dues in order to remain eligible for work in B.C. and thus remain on the B.C. membership list. There is no way for this study to determine actual membership in the area, but it is possible the rate of return for the construction union is not disproportionate to the actual population of active members in that union.

Other limitations of the survey data must be acknowledged. The sample was not randomized. The largest unions were selected and only active members who were in direct contact with a Union representative were asked to complete surveys. As the distribution was done by the Local Union Representatives, there is no assurance of consistency in directions or answers to questions posed. As not all of the surveys were distributed at Local meetings, there is no assurance that the respondents in fact come under the definition of "active member" originally given. The instrument itself presented problems to some individuals who remarked that none of the real reasons for not attending courses were listed. It would perhaps have been a good idea to leave a space for "other" reasons to be identified.

In spite of these shortcomings the findings follow closely other similar survey findings in several areas. These will be noted with the findings from the various parts of the survey. Discussion at this time will be limited to

speculations as to the reasons for unexpected findings and comparisons to findings of other similar surveys. Results will be reported as frequency distributions (N = 193) and as percentage distributions. Percentages are calculated to the nearest hundredth. This sometimes results in totals being greater or lesser than 100%.

### Personal Characteristics

Table 9 provides information on the demographic variables of sex, age and marital status. Just over half of the respondents were female, not a surprising statistic considering the large percentage of public sector participation in the survey. In a capital city such as Victoria, where a large proportion of the workers are government office workers, it is to be expected that a high percentage of the employees will be female. This is in contrast to the provincial breakdown of male/female unionized employees, which is 67.3% and 32.7% respectively (B.C. Labour Directory, 1983).

Table 9

Personal Characteristics (Sex, Age, Marital Status)

Characteristics	Frequency and Percentage Distribution	
<b>Sex</b>		
Female	98	(50.78%)
Male	95	(49.22)
<b>Age</b>		
18 - 24	9	( 4.67)
25 - 29	28	(14.50)
30 - 34	43	(22.28)
35 - 44	61	(31.60)
45 - 54	38	(19.69)
55 plus	14	( 7.25)
<b>Marital Status</b>		
Single	38	(19.69)
Married	116	(60.10)
Separated/Divorced		
Widowed	39	(20.20)

The largest single group of respondents (31.60%) were between the ages of thirty-five and forty-four. However seventy-three percent were under forty-four. Only seven and one-quarter percent are near retirement age.

By far the greatest number of respondents were married. The remaining forty percent split evenly between single and separated/divorced/widowed.

### Educational Attainment

The level of formal schooling completed by the respondents is reported in Table 10. Greater than forty-five percent have some postsecondary education with almost twenty percent of those reporting to be graduates of postsecondary schooling. These results are considerably different from those reported by Waniewicz (1976) from his study of a general adult population in Ontario. Waniewicz reports the educational attainment of the Ontario Labour Force (union and non-union) to be as follows: under grade nine--19.4%, some high school--36.1%, completed grade twelve--20.3%, some postsecondary--14.7%, and graduate of post secondary--9.5%. The results from the present study are somewhat surprising but may again be explained by the large number of public sector workers in the sample as well as by the capital city location. Many bargaining unit employees of the provincial government are employed in occupations requiring high levels of schooling and many of these workers are centrally located in the provincial

ministry offices in Victoria.

Table 10

Educational Attainment

Level of Schooling	Frequency and Percentage Distribution
1 - 8 years	2 (1.03%)
9 - 11 years	26 (13.47)
12 years	78 (40.41)
Some postsecondary	50 (25.90)
Graduate of postsecondary	37 (19.17)

Occupational Status

Occupation was divided into only four categories: unskilled or semi-skilled, skilled, sales, clerical or service, and professional. Responses to this question are represented in Table 11. The smallest percentage of respondents placed themselves in the professional category. Most (35.75%) considered themselves skilled. A large percentage (33.67) were in the clerical or service categories while some (18.13) said they were semi- or unskilled.

Table 11

Occupational Status

Occupational Category	Frequency and Percentage Distribution
Unskilled/semi-skilled	35 (18.13%)
Skilled	69 (35.75)
Sales/Clerical/Service	65 (33.68)
Professional	24 (12.44)

Adult Education Experience

Respondents were asked if they had participated in any education programs since they had entered the workforce. Examples of activities such as course, workshop or seminar were provided. Almost eighty-two percent of the respondents answered in the affirmative (Table 12).

Table 12

Adult Education Experience

Response	Frequency and Percentage Distribution
Yes	158 (81.86%)
No	34 (17.62)
No answer	1 (.52)

This represents a very high rate of participation and is perhaps a reflection of the involvement these respondents have in the labour movement. As will be shown in the discussion of sponsorship of the education and content category, much of the education in which the participants were involved was sponsored by the union or was labour oriented.

Table 13 represents the sponsorship of the educational activity with choices being employer, union, a formal education institution or other. Most of the courses taken were sponsored by the union, or in some cases jointly sponsored by the union and the employer. (In this case each was counted, raising the total response to  $N = 164$ ). However, a very large number of courses (34.76%) were sponsored by formal education institutions. Respondents named such organizations as the Y.M.C.A., St. John's Ambulance, the Church, professional associations and self as other sponsors.

Table 13

Sponsorship of Educational Activity

Sponsor	Frequency and Percentage Distribution (N=164)
Employer	37 (22.56%)
Union	61 (37.20)
Formal Education Institutions	57 (34.76)
Other	9 (5.49)

This distribution resembles considerably the findings of Waniewicz (1976) in his study on adult education. He found thirty-one percent of the activities were attributed to postsecondary institutions, sixteen percent to the employer and fifty-three percent to others. The major difference is that he breaks "others" down to community or cultural groups (27%), interest and sport groups (9%), radio and television (2%), and self-directed (15%), whereas the present study shows thirty-seven percent sponsorship by unions alone.

Respondents were asked to name the most recent course in which they had participated. Not all surveys included a response in this section, however by listing the responses that were given and categorizing them, it was possible to come up with four major categories: "Work Related", being those courses sponsored by the employer or with a logical connection to the respondent's occupation (for example, Shorthand for someone who was in an occupational category of sales, clerical or service); "Labour Related", being those courses sponsored by the union or obviously involved in labour relations (for example Shop Steward Training); "General Interest", being those courses sponsored by formal education institutions or other organizations that bore no relation to either work or union (for example, Scuba Diving); and "Courses for Degree or Certificate", being those courses which individuals specifically named as such

(for example Public Administration Degree Program). The results of the one hundred and thirty-three responses are reported in Table 14.

Table 14

Educational Experience by Category

Category	Frequency and Percentage Distribution (N=133)
Work Related	49 (36.84%)
Labour Related	51 (38.35)
General Interest	21 (15.79)
Degree or Certificate	12 (9.02)

Again, results show that many of the courses (thirty-eight percent of those courses identified) were labour related. With regard to work related courses, it would appear that not all of these were employer sponsored. This is evident from the fact that thirty-six percent reported having taken work related courses while only twenty-two percent reported their courses as having been employer-sponsored.

Perceived Barriers to Participation

In the final part of the survey questionnaire, respondents were asked to identify any obstacles to participation they perceived from past experience or projected to future endeavours. Findings are tabulated in

Table 15 in descending order of frequency. These results closely resemble surveys conducted with general populations. Cross (1981), for example, summarizes the obstacles identified in a huge American survey in descending order of frequency as: lack of time, costs, scheduling, institutional requirements and red tape, lack of information, lack of child care and/or transportation, lack of confidence and lack of interest. Similarly Waniewicz's (1976) results reflect the same kinds and distributions of obstacles identified. The Alberta study from which this item was taken had very similar results as well.

As the identical item and similar samples were used in both studies, it is of interest to compare the results of the two studies. The comparison is reported in Table 16.

Table 15

Perceived Barriers to Participation

Obstacle	Frequency and Percentage Distribution
Not enough time	77 (39.89%)
Courses offered at the wrong time	76 (39.38)
Job responsibilities	56 (29.02)
Courses are not offered in the right location	53 (27.46)
Cost (books, tuition, child care)	45 (23.32)
Time required to complete program	43 (22.28)
Home responsibilities	43 (22.28)
Courses are not worthwhile	32 (16.58)
Not enough energy; too tired	31 (16.06)
Employer does not encourage me to take courses.	29 (15.03)
Not enough information about courses	28 (14.50)
Don't enjoy studying or taking tests	19 (9.84)
Not likely to hear about opportunities	17 (8.81)
Strict attendance requirements	14 (7.25)
Afraid I'm too old to begin	10 (5.18)
No transportation	10 (5.18)
No child care	6 (3.11)
Union does not encourage me to take courses	4 (2.59)
Don't meet requirements to begin program	4 (2.07)
Afraid I might fail the course	2 (1.04)

Table 16

Perceived Barriers to Participation: Comparison of Response in Konrad et al Study (1979) to Responses in Present Study

Obstacle	Konrad <u>et al.</u>		Present Study	
	Percentage Distribution	Rank Order	Percentage Distribution	Rank Order
Courses offered at the wrong time	35.5	1	39.4	2
Job responsibilities	35.3	2	29.0	3
Not enough time	34.6	3	39.9	1
Courses are not offered in the right location	32.0	4	27.5	4
Home responsibilities	30.0	5	22.3	7-6
Not enough information about courses	21.9	6	14.5	11
Cost (books, tuition, child care)	21	7	23.3	5
Time required to complete program	16.7	8	22.3	6-7
Employer does not encourage me to take courses	13.4	9	15.0	10
Courses are not worthwhile	13.0	10	16.6	8
Not enough energy; too tired	9.8	11	16.1	9
Don't enjoy studying or taking tests	8.2	12	9.8	12
Not likely to hear about opportunities	7.6	13	8.8	13
Don't meet requirements to begin program	7.5	14	2.1	19
Strict attendance requirements	7.3	15	7.3	14
Union does not encourage me to take courses	4.8	16	2.6	18
No child care	4.5	17	3.13	17
Afraid I'm too old to begin	3.9	18	5.2	15-16
Afraid I might fail the course	3.3	19	1.1	20
No transportation	3.1	20	5.2	15-16

### Summary

Survey data presented in this section provide a general profile of the union members in the sample. They are a group divided almost evenly by sex, tending to be young to middle age. They are mostly married and have mostly completed high school or higher levels of education. They work predominantly in skilled occupations and almost all have recently participated in some form of adult education. The primary obstacle to participation is time constraints.

### University of Victoria Extension Division

The Division of Extension is the arm of the University of Victoria which conducts adult education as it has been defined for this study, that is, activities planned for adults who have already entered the workforce. The Division conducts programs under the general descriptions of Community Education, Professional Development and Part-time Degree Credit. The University of Victoria Extension Division is constantly growing and evolving. It has achieved several awards of distinction for programming, an indication of its highly respected reputation among Continuing Education Institutions throughout Canada.

Formal, semi-structured interviews were conducted with Dr. Glen Farrell, Director of Extension Division, University of Victoria, and Dr. Laurence Devlin, Co-ordinator, Program

Development and Evaluation, Division of Extension, University of Victoria, to obtain information necessary for a detailed description of Extension services. Information was sought under the general areas of Structure, Policies, Resources, and Common Beliefs and Values, with answers sought to the specific questions as outlined in Appendix D.

### Structure

The Extension Division is organized on the basis of discipline areas, much like the campus as a whole. Programs are offered in such areas as Education, Human and Social Development, Arts and Science, Language, Fine Arts, and Business. Each of the content areas is connected with the appropriate Academic Faculty or Department. Within each area, programs may be offered as Community Education (non-credit), Professional Development (sometimes certificate programs) or for Part-time Degree work (University credit).

The organization is based on a matrix management model with co-ordinators responsible for program areas while other staff are responsible for overall program sectors (Community Education, Professional Development and Degree Programs). Education Extension provides an example of how this system works. A faculty co-ordinator in Education has overall responsibility for Education Extension programs. Three co-ordinators in Education look after programs as they

belong to individual programming sectors of community education, professional development and credit courses. The Division of Extension assigns responsibilities for overall co-ordination of a programming sector to a Program Co-ordinator in Extension.

The Extension Division additionally recognizes that the different types of clientele it serves must be taken into consideration during program planning. Staff are assigned responsibilities accordingly, for example, for Women's Issues or Senior Citizen's Programs.

Course approval structures are connected to the Academic Department sponsoring the program. The structure typically involves one to three steps of approval within a department. Final approval comes from the Senate Committee on Extension.

Program developers have considerable autonomy in terms of building, designing and delivering a program, keeping in mind the approval structure. The Extension Division is committed to improving the quality of programs and to expanding the numbers and types of clientele it serves. It welcomes innovative ideas for program content and delivery technique.

Programs are initiated by various means. For examples, program Co-ordinators may suggest programs, interest groups may contact the Extension Division to request programs or programs may be identified by potential

clientele through needs assessments. The major point here is that the initiation process is flexible. The Extension Division is constantly working with other agencies to establish programs. Its personnel respond to needs expressed by interest groups, associations or individuals wherever possible.

### Policies

Formal overall policies governing University Extension are established through the normal appropriate administrative channels with ultimate authority in the hands of the Board of Governors of the University. Policies on programs are made by sponsoring academic departments. The Director of Extension liaises with the University administration to make operational decisions which affect the day-to-day administration of the Extension Division.

There are no academic prerequisites for non-credit programs. Credit programs follow the same prerequisite policies of courses offered for full-time degree pursuit, directly through the appropriate Faculty. There is presently no recognition of experiential learning or of educational accomplishment outside of the realm of university or college education.

Priorities for programming are recommended by the University Extension Strategic Planning Committee from submissions of Extension staff. The criteria for the establishment of program priorities are centred around three

concerns: need, quality, and cost. Need is considered to be manifest if there is demonstrable evidence of need and if the need is pressing and timely. When the question of quality is considered, concerns such as effective design of program and commitment from academic sponsor are discussed. Cost considerations include, is the program capable of recovering all direct and overhead costs?

Minimum enrollment required in order for a course to be delivered is based on a cost recovery formula. The tuition of students must cover all direct and overhead costs (i.e., materials, classroom space, instructor salary, etc.). Tuition varies as does class size. Typically an enrollment of twelve to fifteen students will enable a course to be delivered.

Instructors are recruited from the University faculty as well as from the community at large, especially in the case of community education programs. The University Extension Division is anxious to ensure high quality instruction and therefore screens potential instructors carefully. This does not mean Extension is restricted to hiring only persons with specific academic training. Experience and expertise in the content area are often adequate qualifications.

The University of Victoria Extension Division is tremendously flexible in terms of methods of delivery, curriculum content and location of course. It is capable of

offering and currently does offer programs via Knowledge Network Television, Teleconferencing, and Independent study packages (print, video cassettes and audio cassettes) as well as the more traditional lecture format both on and off campus. Curriculum content currently offered is as diverse as the adult learner may be, ranging from practical studies in "Basic Financial Management for Women" to issue oriented programs such as "The Right to be Human". Course offerings for Spring 1985, numbered in excess of ninety.

The University Division of Extension is not able to offer students registered in its programs the wide variety of services open to full-time students. Students in non-credit programs are eligible for Courtesy Extramural borrowing privileges at the University library. These privileges do not extend to students in one-day seminars or weekend courses but these students may apply to become a fee paying Extramural borrower. The library is open from 8:00 A.M. to 10:00 P.M. weekdays, 10:00 A.M. to 6:00 P.M. Saturdays, and 10:00 A.M. to 10:00 P.M. Sundays. Bookstore hours are not quite as flexible (weekdays 8:30 A.M. to 5:00 P.M., and Saturdays 10:00 A.M. to 4:00 P.M.) which could prove to be a disadvantage to working adults.

The special needs of adult students who have taken time out from their formal schooling are recognized by the University. The University Counselling Centre has published a handbook for part-time students designed to ease the

transition to university learning. Available at a price of \$11.95, the handbook, called Strategies for Studying: A Handbook of Study Skills for Part-time Students, contains sections on time management, reading and remembering and writing essays and reports. A "Learning and Study Skills" course is also presented for part-time students. The course lasts four weeks (four, three-hour sessions) and costs \$25.00. Unfortunately the more extensive offerings of the University of Victoria Counselling Services are not open to students registered in University Extension.

Child care services are not offered to students registered in University Extension courses.

### Resources

The University of Victoria Extension Division has four major sources of revenue. It receives a portion of the operating grant from the University. These funds primarily cover operational costs. Revenue is also received by way of tuition from students. These fees are expected to cover all direct costs of a course; sometimes fees exceed these costs so that some offsetting of other expenses may be accomplished. An additional grant for Distance Education goes towards development of Extension's services in that area. Finally, resources are sometimes found through program underwriters where the University acts more or less in the capacity of broker or consultant.

The Extension Division does not have a large staff relative to its services. Nevertheless, new programs are constantly being initiated, an indication that there are personnel with time to devote to implementing an innovation. There is among personnel however, a lack of expertise to cover every area of interest which may arise. Most notably for this study, with the exception of the Director, there is no person with direct experience in the area of labour education.

#### Common Beliefs and Values

Personnel at University Extension were asked to give a position on labour education as a potential offering of the Division. Specifically the interview was intended to lead to a description of the Division of Extension's beliefs as they pertain to labour education and the labour community.

Labour education is seen as education intended for union members. The University Extension has no rigid or predetermined idea of exactly what labour education is or how curriculum should be approached. Several possible views were stated. The first view is one of education for specific skills required in the labour movement. Following this view, programming would include curricula such as "Conducting Meetings" or "Public Speaking". Generally, content would be determined by the demonstrated needs of a person involved in the labour movement. The second possible

approach is to consider the skills on a more generic basis so that a course such as Advocacy Skills or Comparative Economics would be appropriate. On the most abstract level labour education may be viewed as falling in the area of liberal arts. This view would see courses like the History of the Labour Movement and Working Class Literature.

While University Extension does not view labour education as a means of social reconstruction there is recognition that it may of necessity have a distinct ideological basis. Programs currently offered on issues such as "The Future of the Welfare State", "Global Problems, Local Solutions", and "Women in Action" indicate a willingness of the Extension Division to deal with essentially political matters where social action is implicit. The concern of the University Extension Division is that any program it sponsors must be able to defend a charge of lack of objectivity.

University Extension has a genuine commitment to serve the needs of labour, a fact demonstrable in its previous attempts to establish programs for the labour community. These attempts were frustrated by lack of commitment on behalf of the labour community. Resulting from the frustrations is an understandable hesitancy to put time, work, and money again into an endeavor which ultimately may be quashed by labour leaders. Some assurance of commitment on behalf of the labour community would be required before

an effort would be made by the University towards establishing a labour education program.

### Summary

The University of Victoria Extension Division is an extremely flexible operation, especially in the area of nondegree programming. Adult learners are offered a wide variety of courses, delivery methods and educational services. The institution is committed to serving the needs of the community, including the labour community, and it has the structure, policies and resources to enable it to do so.

### Labour Education as Innovation

The theoretical framework developed in Chapter III explains that the description of an adult education program as an innovation need only be a general statement of the aims of the innovation, and the approach from which decisions should be made with regard to developing a curriculum. Leithwood (1980a) describes this as the "platform" which forms the foundation on which all other decisions about the program should be based. Adherence to the platform prevents subsequent violations of the integrity of the innovation.

The description stated here takes into account the views on labour education stated during interviews with labour representatives, University personnel and other postsecondary representatives. It looks to the literature

in labour education and adult education for an appropriate orientation to labour education for the University of Victoria Division of Extension.

A platform for labour education as an innovation for the University Extension, must not offend the beliefs of the labour community as stated by labour representatives during interviews. At the same time, it cannot place the Division of Extension in a position where charges of lack of objectivity can be levelled.

According to John Whitehouse (1977), the Chief of the Worker's Education Branch of the International Labour Organization of the United Nations, it is necessary to see that labour education "is clearly distinguished from activities to do with the general adult education of workers" (p. 147). The distinction is made by comparing the objectives of adult education and labour education. He says labour education should aim for the collective good of the labour community rather than for individual development, which is the aim of adult education generally. Similarly, the National Conference on Labour Education held in Canada in 1975 saw labour education as that which encourages an understanding of the role of union members within their union and the role of the union within society.

The overall aim of a labour education program planned jointly by the labour community and the University of Victoria must be to lead to an understanding of the goals,

beliefs, roles and issues of the labour movement. Learners engaged in the education would become better informed and more responsible citizens through this understanding.

An education program whose ultimate aim is to produce better citizens and thus a better society is named education for social reconstruction in the literature in adult education. Decisions made in terms of future program development should be approached from this orientation.

This very broad platform provides a common ground from which to plan a program of labour education. By not clashing with the specific beliefs of either the labour community or the University it accomodates the stance of both.

#### Socio-Political Context

The social, economic, and political context in which the elements of user, agency and innovation seek to establish a relationship can be described from accounts of popular newspapers and magazines. For this study, an extensive opinion poll conducted by Decima Research Ltd. of Toronto for MacLeans Magazine, (Miller, 1985) was used as the basis for establishing prevalent attitudes and perceptions of the socio-political reality. The poll was conducted between November 1 and November 11 of 1984. It included, in a total of fifteen hundred Canadians interviewed, one hundred and seventy participants from

British Columbia. While the results are reported for the national sample, exceptional regional differences are indicated in the text. The major points reported from the forty-three questions posed are used here to provide the details for relevant contextual factors.

### Social

According to Newman (1985) in his essay introducing the results of the poll, Baby Boomers are expressing "individuation" as the latest current trend. He says that Canadians are beginning to assert themselves rather than adopting the trends from the States and that their style is based on individual rather than peer preference (p. 11). This interest in the individual is evidenced in responses to the question: "How do you feel about the following statement?: We should rely more on individual initiatives and not so much on government." Respondents agreed or strongly agreed eighty-four percent of the time. Other responses to questions pertaining to the home, sexuality, women, employment, youth and aging, add to Newman's (1985) contention that "this . . . individuality has pried [Canadians] loose from institutional sources of deference such as the church, governments, unions or business" (p. 11).

The corollary to this finding is that unions are generally held in low esteem. On the two questions posed

regarding the efficacy of unions, results showed respondents felt that unions were either not doing a good job or were harmful (Miller, 1985). Eighty percent of the respondents felt that both government and business were better able to look after an individual's economic interest than were unions. When asked about labour unions' policy of protecting members from job loss through technological change, sixty-four percent of the respondents felt unions were thereby "hurting the economy" (p. 34).

### Economic

In the MacLeans/Decima poll, asked without prompting, to cite the most important issue confronting the country, fifty-three percent of the respondents said unemployment. In British Columbia, where the reality touches most residents either directly or through friends or relatives, the high rate of unemployment is even more readily recognized as the number one economic issue. In answer to a question about economic concerns other than unemployment, given interest rates, the federal deficit, the value of the dollar and inflation, thirty-eight percent of respondents said inflation, twenty-three percent the value of the dollar, twenty-one percent the federal deficit and eighteen percent interest rates. It was clear from the results of the poll that Canadians see economic problems in terms of their most direct effect on the individual. Problems like

the federal deficit, which appear more removed from most individuals' daily functions are less frequently seen as a problem.

### Political

In 1984, the Progressive Conservative Party won a landslide victory in the Federal election. There remains only one provincial government which is not governed by a conservative party. Many analysts conclude that Canadians are moving to the right of the political spectrum. The analysts of the MacLeans/Decima poll contradict this opinion by claiming that sixty-seven percent of Canadians are against the elimination of social programs to reduce the federal deficit, "a cherished right-wing solution" (p. 12). Nevertheless, the current spending cuts in social programs and education instituted by the Social Credit Government in British Columbia illustrate a strong leaning to the extreme political right. The residents may not all be in favour, but the political reality exists.

### Summary

The context within which labour education may be planned at the University of Victoria Division of Extension is one where unions are generally held in low esteem, and individuality is praised; where unemployment soars and fear of loss of jobs is the greatest concern of most Canadians;

and where governments, provincial and federal, are from the right of the political spectrum. Implementation of a labour education program sponsored by the University of Victoria Extension Division must be viewed in light of these realities.

### Obstacles

By viewing the individual elements of user, agency and innovation in relation to each other, obstacles to implementation may be identified. Some of the obstacles are apparent from logical deduction, some of them are described generally in the literature concerning implementation and participation in adult education, and some are identified from empirical investigation of others' experiences. Formal interviews were held with personnel from postsecondary institutions in Canada. The major aim of the interviews was to determine obstacles that had been encountered in labour education programs which have been or are currently being planned and to identify any successful strategies for obstacle elimination. Interviews were held with Lorne Yakuk, Grant MacEwan Community College, Edmonton; John Minnis and Tony Simmons, Athabasca University, Edmonton; Joe Palucci, University of Manitoba, Winnipeg; Elaine Bernard, Simon Fraser University, Vancouver; and Glen Farrell, University of Victoria, Victoria. Mr. Jim O'Neill, from St. Clair College in Windsor, declined an interview.

Discussions were also held with the following members of the labour community who have in the past or do presently work on labour education programs with postsecondary institutions: Pamela Kirkwood, the Alberta Union of Provincial Employees, Edmonton; Winston Gereluk, formerly of the Alberta Union of Provincial Employees, Edmonton; Paul Lessard, Labour Education Centre, Winnipeg; and Frank Wall, the International Woodworkers of America, Vancouver.

The process for identifying obstacles involves an examination of the details of the elements in pairs, resulting in three pairs: 1) a description of the user in relation to details in the description of the agency, 2) the user in relation to details in the description of the innovation, and 3) details in the description of the agency in relation to the innovation. Finally the three are examined together in a socio-political context.

Leithwood and Montgomery (1980) say there is an unavoidable link between obstacle and strategy and that "the basis for classifying obstacles becomes a critical factor in developing an effective typology of intervention strategies" (p. 9). They recommend categories called lack of skill or knowledge, lack of reward, motivation or incentive and lack of material resources and/or appropriate organizational arrangements. These categories refer to obstacles arising from studies of the user, and while to that degree they are useful, this study has shown that obstacles also can be

identified arising from the innovation itself, the agency charged with delivering it and the socio-political context. For this reason, this study chose classifications which relate to the source of the obstacle: the user system, the users as individuals comprising a group, the agency, the innovation, and the socio-political context.

The framework originally developed for this study did not specifically allow for the identification of positive features of the elements and their interrelationships which would influence successful implementation. This study does identify such positive features, because a change agent, by capitalizing on the positive, may avoid an obstacle. Thus a strategy may be derived directly from the positive feature.

This section will first identify obstacles and positive features by viewing the elements in relation to each other. It will then recapitulate these obstacles and positive features under the classifications generated from the process, origin or source of the obstacle.

#### The Labour Community and University of Victoria Extension

The fact that labour has a formal structure as does University Extension creates a potential obstacle when collaboration on a project is attempted. Each system needs to recognize its own leadership, approval structures and authorities, making decision-making slow, difficult, and

complex. In addition, the labour movement is not one cohesive body but has internal power struggles which impede progress when consensus is sought, and make it difficult for a change agent to know whom to approach and how not to offend. In fact, the intensely political nature of the labour community is itself a big obstacle when outsiders are attempting collaborative activities with the labour community.

Another potential obstacle arises from the policies of the CLC and the University each to control education functions. The policy of the Canadian Labour Congress with regard to working with postsecondary institutions, in essence demands complete control over the administrative and educational functions of the postsecondary institution. It is strongly stated and results in resentment on the part of personnel in the institution. This resentment was consistently communicated during interviews with personnel from the various postsecondary institutions. Attempts to overcome this obstacle are confounded by time constraints of union personnel. Demands for complete control over curriculum, delivery and instructors bring with them great demands on the time of those labour representatives involved, time few of them have to offer.

Resources, or more importantly the lack thereof, on the part of both the labour community and the University are another obstacle. The labour community has a personnel

problem when an investment of time is required; the University's personnel problem involves both time and expertise. Current demands on the personnel of both systems mean that little is left to devote to the time-consuming project of implementing an innovation. Financial constraints are an additional problem. This is especially so as government spending cuts have limited the University's ability to extend its services. Economic restraints have meant a diminishing dues paying membership for unions and their centrals.

A very strong and frequently encountered obstacle arises out of the common beliefs of the user system. It is the attitude of mistrust expressed by the labour community for the University which makes collaboration difficult if not impossible at times. As one interviewee stated, the labour community considers itself the "custodian of a point of view" over which it exercises vigilance and towards which it is extremely protective. Attempts on the part of Universities to conduct labour education are often seen as attempts either to misconstrue the point of view or to ignore it, neither of which is acceptable to labour. The mistrust and fear is not entirely unfounded. Postsecondary institutions have offered programs under the guise of labour education which were in fact motivated not by a sincere wish to serve the needs of labour, but by a wish to attract a new sort of clientele, thereby increasing revenue. In these

"quick and dirties" as they were referred to by one of the program co-ordinators interviewed, labour's point of view is not just ignored, but actively negated. The result, of course, is to raise suspicion about all attempts by Universities to respond to labour's needs. Further doubt is generated if the University is perceived as being management or business oriented; courses offered by the University are immediately seen by the labour community as contrary to its own philosophical stance.

Labour's mistrust creates an attitude of pessimism among University personnel who have made sincere overtures only to have them disregarded. This negative "prehistory" as Fullan (1980) calls it, reduces the inclination of university personnel to attempt labour education programs in the future. This obstacle is doubly barbed and one which must be given careful consideration when developing strategies for implementation.

Features relating positively to implementation and identified by viewing the labour community and the University Extension are numerous. The user system's structure can be used for the identification of the appropriate persons with whom to plan educational activities. Persons hired in the labour movement to conduct labour education programs have an obvious expertise on which a change agent could capitalize. A clear policy, at least, ensures an understanding about the stance of the user with

regard to working with postsecondary institutions. Perhaps most important, education around issues of common interest to unions and their members has already been identified as one medium for drawing the diverse groups together. The communication systems developed by the labour movement are an important resource upon which the University Extension Division may draw for the purposes of relaying information about its services. Finally, University Extensions' flexibility in planning and delivering programs and its practice of working with other agencies bode well for collaboration with the labour community.

The personal characteristics of the active union members in Victoria reveal no initial obstacles to participation. The majority are in an age group (twenty-five to forty-five years old) shown to be most likely to participate in adult education activities. A large proportion (forty-five percent) have at least some postsecondary education, another factor which points favourably to participation. Even more telling is the overwhelming number who have recently participated in some organized educational activity. More than eighty percent of the complete sample, which includes respondents who had completed less than grade twelve formal schooling, indicated they were or had been participants in some adult education activity. Striking for this study is the fact that participation in labour related courses was very high, with

greater than one quarter of the respondents (26.42%) having taken a course sponsored by the union. The demographic variables associated with participation in adult education also characterize the active unionists in Victoria thus supporting a prediction of a high rate of participation.

The obstacles named by individual union members, when classified into Cross's (1981) categories of situational, dispositional and organizational, show the top five most frequently cited barriers were mostly organizational in nature: Courses offered at wrong time (39.38%), courses not offered in the right location (27.46%), and cost (23.32%). All of these barriers are under the direct control of an institution offering programs. The other two most frequently named obstacles (not enough time 39.89%, and job responsibilities, 29.02%) are situational barriers which may also be manipulated by flexible scheduling and delivery techniques on the part of the University. Dispositional barriers, afraid of failure for example, are more difficult to overcome. However, no dispositional barrier was named by more than thirty-two respondents (16.58%). Barriers of all kinds named by at least ten percent of the respondents were, in descending order: Not enough time, courses offered at wrong time, job responsibilities, courses offered at wrong location, cost, home responsibilities, time required to complete program, courses not worthwhile, employer's lack of encouragement, not enough energy and not enough information

about courses.

### The Labour Community and Labour Education as Innovation

The greatest congruence and therefore a source of fewest obstacles is found in the relationship between the description of the labour community and the description of a platform for labour education. The labour community already conducts its own education programs. These programs are attended by a high proportion (over thirty percent of respondents to the survey) of the active unionists, a positive indication for future participation in labour education programs. The only possible obstacle which could be anticipated is within the group of individuals who do not presently attend labour courses and who may, in the survey, have identified such courses as among those "not worthwhile".

### University of Victoria Extension Division and Labour Education as Innovation

Because labour education is often seen to be explicitly ideological, the University of Victoria Extension Division in offering such a program may find itself facing charges of spreading propaganda. This major obstacle is one that creates problems within an institution and from without. A university cannot be seen as openly promoting an ideology; objectivity is demanded by persons working in the

university and by the public at large. The labour community has a specific ideology. Education about labour is often confused with education for the promotion of labour's ideology. The confusion may exist among the University's personnel, labour representatives, and the public. The confusion leads to problems ranging from initial rejection of a labour education program to controversy about specific content for the program. If support is to be gained from institutional personnel, the general public, and the labour community, the obstacle must be avoided by careful planning of appropriate strategies.

Another obstacle arises from the fact that labour education is multi-disciplinary, not easily fitting into the academic organization of University Extension. This creates an obstacle where sponsorship of a department or faculty is sought. Where priorities for programming are recommended by a committee from suggestions made by Extension personnel, presumably it is important to have a strong sponsorship and commitment from within.

The practice already established by University Extension of presenting programs with explicitly political grounds, and programs of a multi-disciplinary nature points positively to Extension's ability to deal with these obstacles.

Labour Community, University Extension and Labour  
Education in the Socio-Political Context

A relationship among the three elements does not operate in a vacuum. This is especially the case where a public institution is involved. The current social political and economic realities are important and are the source of additional obstacles.

The generally bad reputation of unions in the public eye creates problems where a public institution attempts to meet the needs of those unions in the area of labour education. A public institution actively seeking public support does not want to alienate any segment of the population. A current trend towards individualism, the antithesis of the co-operative spirit of labour, does not augur well for the establishment of a program intended for labour's benefit. When priorities are considered, current trends such as personal growth programs arising from individualism could be seen as more "timely or pressing".

The economic restraint program of the federal and provincial governments are distinct obstacles since public funds are being considered. Governments in the past have given grants for the development of labour education programs at postsecondary institutions. Such grants were sometimes the impetus behind the development of programs and in all cases meant many obstacles could be overcome. The lack of such grants in today's political and economic

climate may be seen as an obstacle.

The political tone in a province where labour and government have so recently and violently clashed, such as in British Columbia during "Operation Solidarity", is not an ideal one in which to establish a labour education program at a public institution. It does not create a discernible obstacle, but it creates a general feeling of antagonism which may be projected into planning educational activities.

### Summary

Descriptions of the elements of the user, the agency and the innovation, and an analysis of their interrelationships, led to the identification of a number of obstacles to implementation. The obstacles are recapitulated in this summary in the following categories: user as system, user as individuals comprising a group, agency, innovation and socio-political context.

### User as System

1. The labour community is a formal system with a complex structure which can delay decision-making. This problem is exacerbated when labour as a structured organization works with another structured organization such as the University's Division of Extension.
2. The political sometimes volatile nature of the relationship among members of the labour community makes it difficult for a change agent to get consensus and creates a situation where appropriate protocol is sometimes difficult to discern.

3. The strong policy of labour to control decisions traditionally made by educational institutions (i.e., curriculum and instructors) creates a potential for conflict.
4. The time pressures on labour personnel make it difficult to find persons able to devote time to the planning and implementation of a labour education program sponsored by the University of Victoria.
5. The economic constraints of unions make it difficult for them to treat education as a high priority.
6. Mistrust on the part of labour for universities generally sometimes makes labour reticent when approached by a university for the purposes of collaborating in an educational activity.

#### User as Individuals Comprising a Group

1. Individual union members have limited time to participate in adult education activities.
2. Because of continuous shift work, course schedules are often inconvenient.
3. Individuals identified a problem with courses not being conveniently located.
4. Tuition, books, transportation, and other costs are a barrier to participation.
5. Other responsibilities such as those associated with home and job, conflict with participation in adult educational activities. Associated with job responsibilities is the lack of encouragement to participate especially from the employer.
6. Individuals claimed they were too tired or lacked energy to participate in adult education. Some interpreted this to be lack of motivation.
7. Courses were often seen as not being worthwhile. This is essentially an expression of lack of interest.
8. Lack of information about courses was identified as an obstacle.

### Agency

1. The complex structure of the University Extension Division, when coupled with the complex structure of the labour community, makes collaborative endeavours slow moving and difficult.
2. Time constraints of Extension personnel make it difficult to generate the time necessary for the implementation of an innovation.
3. Lack of expertise in the field of labour education is a barrier to implementation of a labour education program.
4. Financial constraints of the University are an obstacle to planning new programs.
5. The past history of the Division of Extension, marked by several failed attempts to start a labour education program, has created a reluctance to try again.

### Innovation

1. Labour education aimed at an understanding of labour is politically charged and runs the risk of public criticism if it is seen to be less than objective.
2. Labour education is multidisciplinary, making it more difficult to find an academic sponsor. Extension programs must be associated with a department or faculty in the University.

### Socio-Political Context

1. Labour organizations are publicly held in low esteem. Education aimed at labour may be equally unpopular.
2. A trend towards individualism makes the role of labour in this society a dubious role at best.
3. Severe economic restraints make additional funding for new programming difficult to obtain.
4. The antagonism between Government and Labour in British Columbia does not create a nurturing environment for establishing a labour education program in a public institution.

Descriptions of the elements of the user, the agency and the innovation, and their interrelationships additionally generated features which could work positively for implementation. The positive features must also be considered when devising implementation strategies, for by capitalizing on a strength an obstacle may be precluded or overcome, making implementation more likely to succeed. Positive features are summarized, as the obstacles are, under the element which was identified as its source. In this case, the socio-political context offers no positive features.

#### User as System

1. A recognized structure makes it easier for a change agent to identify the leaders with whom she/he should work.
2. Financial problems within unions may stimulate members to look to outside organizations for assistance in areas such as education.
3. Labour has full-time officers both knowledgeable in and enthusiastic about education for its membership.

#### User as Individuals

1. A large proportion of the individual union members have already shown a tendency to participate in adult education activities, especially labour-related education.

#### Agency

1. University Extension's services in the area of Community Education are flexible in terms of curriculum, delivery and target audiences.

2. The Division of Extension has an established practice of working with other organizations in an effort to meet their educational needs.

### Innovation

1. Labour education has the potential of attracting participants who have not traditionally been participants in adult education. Individuals whose limited formal education places them in a category usually considered to be non-participant show a proclivity to participate in labour-related education.

### Strategies for Implementation

The stage of devising strategies for implementation is closely linked with the identification of obstacles and positive features. Just as the detailed descriptions of the major components of the user, the agency and the innovation led to the identification of obstacles and positive features so does this identification lead to the devising of implementation strategies. These strategies are intended either to avoid, eliminate or ameliorate the obstacles or to capitalize on the positive features.

Strategies were devised from logical deduction, empirical investigation of extant programs and the literature of adult education and implementation. To be recommended for this study, they had to be practical, consistent with societal mores and consistent with sound educational practice. Strategies offending any of these criteria could result in successful implementation, but would place the resulting enterprise in jeopardy.

Strategies were classified in accordance with the

classification of the obstacle, that is according to the source. This system follows the systematic process outlined in the framework for implementation. The change agent, having completed the analysis, will end up with a list of strategies which apply to the successful implementation of labour education for the University of Victoria Extension.

The order in which the strategies are identified do not correspond with a typical model of program planning. Implementation deals with the use of an innovation from its inception through planning, delivery, evaluation, and rejuvenation. The strategies would be applied throughout the process as judged by a change agent.

The strategies recommended are directly associated with obstacles which have been identified in this study. Since the positive features led to the devising of strategies which deal with obstacles, they will be included with the appropriate obstacle. The obstacle in each case is briefly set forth again, so that the association is plain.

#### User as System

The labour community is a complex structure. This obstacle can obviously not be eliminated but it can be somewhat lessened if the change agent starts off on a relationship with the labour community with sufficient information about that structure. The person attempting to

work on a labour education program must have "a good understanding of trade unions, their structure, functions, needs and politics" (MacKenzie, 1980, p. 213). This understanding allows the change agent then to make the structure a positive feature by using it as the basis for identifying the appropriate persons with whom to work. In British Columbia, the position which is identified in labour's structure as the ultimate authority in matters of labour education is the CLC Director of Educational Services. A change agent should initially establish a relationship with the Director. Havelock says, where the structure is clearly defined, "it is critical for us to establish solid relationships with the leaders" (p. 44). More regular contact may subsequently be established with local leaders but at all times, one should be sure the Director is aware of plans and progress. Approval to sit on the Victoria Labour Council Education Committee and/or the BCFL Education Committee should be sought. The committees are a perfect vehicle for exchange of information and serve as a way to expand relationships within the labour community.

The labour community is often rife with internal political struggles. The best a change agent can hope to do is to avoid being seen as involved in these struggles. An international study on implementation reported by Adams and Chen (1981) concludes that an innovation or its proponents

must not be seen to threaten "the power of existing groups" (p. 268). Rather than, a change agent should attempt to establish a relationship through the existing power groups. The change agent should establish relationships with at least the leaders of all the largest unions and with the leadership of the BCFL. A wide base of support may prove useful when problems arise. Such individual leaders can sometimes serve in the capacity of emissaries. On the other hand, being seen to be currying favour with one individual runs the risk of offending the others so caution should be exercised. This is particularly true with the factions arising from the public, industrial, and construction sectors. Issues for education should be chosen for their potential to unite members of the labour community. If experience shows that unity is achieved through concern over matters of common interest, then the change agent should make every attempt to take advantage of that experience.

Labour has a strong policy on labour education which demands control over such features as curriculum and instructors. If a change agent accepts the policy as a statement of labour's expectations, that acceptance represents at least an initial understanding on which a relationship can be built. Early in that relationship, one should clarify with the labour community how the leaders expect that policy to be operationalized. Should a special advisory committee be struck? Would it be possible for the

change agent to sit on a standing labour education committee? If the change agent has established a collaborative relationship with the labour community and acts in the role recommended by MacKenzie (1980) whereby the agent's responsibilities are primarily to interpret trade unions to the university and university to the trade unions, then administrative interference will not be perceived. Collaboration in a true sense will result, with joint decisions being made to the satisfaction of both parties. Successful advisory committees working on labour education programs have resulted in bringing labour and the university much closer "by engendering a mutual understanding of the needs and responsibilities of each and by learning about the interplay between union policy and academic freedom" (MacKenzie, 1980, p. 213).

Labour's personnel are under severe time constraints. Some postsecondary institutions have eliminated this obstacle by seeking rank and file membership on advisory committees or by providing a small stipend to a retired or presently unemployed labour representative to work in co-operation with the institution to plan and deliver programs. Although a change agent should capitalize on the expertise of labour educators and high profile leaders, one cannot rely on them to devote the necessary time. One useful strategy to consider is to establish a subcommittee of the Labour Council standing committee. This

subcommittee, composed of interested rank and file members should act as a working group, meeting regularly. The working committee can then report to the standing committee to keep them informed of progress and to seek opinions. This strategy eliminates some of the demands of time of the official leaders yet establishes a mechanism for them to remain in the role of advisor. The importance of establishing a working group is suggested by Leithwood (1976) as necessary for successful implementation.

Unions are experiencing severe financial constraints. Although lack of funds creates an obstacle to implementing a labour education program, the same condition means that unions now more than ever need to look to outside agencies to offer services to its members. Postsecondary institutions should recognize such ideal conditions for collaboration in labour education. The obstacle created by labour's financial constraints can be ameliorated through imaginative use of the resources available to unions including effective communication networks, building space, personnel, and any funds, regardless of how small the amount may be.

The labour community has an attitude of suspicion towards universities. Havelock names nine characteristics of a change agent-user relationship "that comprise an ideal base from which to launch the innovation process" (p. 55). Among them is an openness between the parties, a condition

which can only be achieved through mutual trust. Trust must be established if collaboration between the labour community and the University is to be successful. The overall strategy for the elimination of the obstacle created by labour's skepticism is for the change agent to build a relationship with representatives of the labour community. Much of the mistrust is based on misconceptions of a university and its personnel; such misconceptions can be corrected through direct contact between members of the labour community and personnel from the University. One labour program co-ordinator from a postsecondary institution interviewed in this study recommended that in the initial stages of discussion regarding a labour education program, the postsecondary institution personnel should be in constant contact with labour representatives explaining and offering the services and resources of the institution and its personnel and generally involving the institution in the labour community in order to build sufficient trust. This kind of involvement, he said, can include participating in labour's education programs as students, observers, or instructors; making available to labour the institution's print, audio-visual, and other materials; conducting research which would be of interest to the labour community and sharing the results with labour leaders; and submitting useful information to labour publications. Such activities may be necessary for one or two full years before an actual

joint attempt to plan a program should be considered. An incremental approach would see a gradual acceptance of the change agent by the leaders in the community. House (1974) recommends that such influential leaders be encouraged to become advocates of the innovation and that the resulting "sponsorship" is a powerful factor in promoting the innovation. At the same time, Regan and Leithwood (1976) caution against an "illogical diffusion model" based on the ripple effect. It is not sufficient to convince the leaders alone. The change agent should therefore attempt to gain broad acceptance in the labour community, making as many contacts as possible. Where labour programs have been successfully implemented in postsecondary institutions, they are almost always associated with an individual, well known and respected in the labour community. One way to gain broad acceptance is to be seen over time as responsible for the success of increasingly larger events. For example, the change agent may start by speaking to union members at their meetings, then progress to instructing a course for the Labour Council and then plan a Conference for union members under the sponsorship of the University Extension. This strategy also makes use of a construct in the implementation process identified by Leithwood (1976) as "successive approximation". Introducing an innovation in graduating stages, he says, makes it more likely that users will accept it.

According to an interviewee from the study, one of the greatest errors postsecondary institutions have made when planning courses with labour is being too ambitious and in too much of a hurry. A relationship of trust is built only over time. The only way to reduce the time is for the institution to hire a representative from labour who has previously established a good relationship within the labour community.

In general, obstacles arising from the labour communities can be overcome through strategies employed over time by a sincere, diligent, and diplomatic change agent.

#### User as Individuals Comprising a Group

Many obstacles identified by individuals can be overcome through institutional arrangements and there is considerable overlap among them. Where this is the case, obstacles are considered together.

Individuals have limited time to participate. Other responsibilities such as those related with the home and job prevent participation. Courses are scheduled at the wrong time. Considerable flexibility on behalf of the University Division of Extension could alleviate these obstacles. Primarily access questions, the problems are common to many groups of working adults. Strategies for their elimination include planning one-day conferences, weekend courses, modular courses and periodic classes and using

teleconferencing, television and correspondence packages as alternatives to the traditional eight consecutive weeks of lecture. The overall strategy as expressed by Cross et al. (1974) is to make the institution conform to the adult student, not the reverse.

Courses are offered in the wrong location. Strategies employed to deal with time obstacles may also alleviate location problems. That is, individual study packages in print or audio-visual media, teleconferencing, and television courses which can be used at home eliminate location as a problem. Other strategies which may prove useful are recommended by Jones (1980) and involve the conducting of classes where the workers are. The shop floor, office lunchroom or cafeteria, union halls, and workers' homes provide suitable alternatives to the university campus. Many individuals in the labour community have no experience with a university and consequently may view the campus with fear. Changing the location of a course to some familiar ground such as the union hall or the local Legion meeting rooms may put a different perspective on the course itself.

Individuals find costs associated with tuition, transportation, books, child care, and so on, an obstacle to participation. If individuals have financial problems, then perhaps the union or the university could employ the following strategies to overcome the obstacle. Tuition

costs can be kept down by keeping the operational costs to a minimum. Unions could sponsor the tuition costs of individual members. Employers could contribute some time-off for education. Unions could encourage co-operation of members to provide child care and transportation.

Individuals are lacking in motivation and/or interest. This dispositional factor (Cross, 1980) is perhaps the most difficult to eliminate. There is evidence to show that where education is seen as relevant and of immediate benefit, there is more likely to be participation. The change agent should design a program with this in mind. Many of the respondents in the study indicate an interest in labour related education, a fact which acts positively for the implementation of a labour education program. A change agent should take this advantage and increase its positive effect by identifying the most pressing issues commonly felt in the labour community. These are the issues around which a program should be planned.

There is a lack of information about courses. Marketing is an important aspect of educational planning and should be seen as an integral part of that process (Hoegg, 1979). The University, along with the labour community, should employ as many marketing tactics as possible, to ensure the communication of information about labour programs. The communication systems of unions and their locals, in conjunction with the expertise of Extension

personnel in the field of promotion, would go a long way to overcome this obstacle.

Individuals from the labour community are in many ways representative of individuals in society at large. Strategies employed to overcome obstacles identified by individuals are generally those applied to any working adults in their role as students.

#### Agency

The University of Extension Division is a complex structure. By working in the programming sector called Community Education, a change agent can avoid many obstacles presented by a complex structure; much more flexibility and latitude are available in the planning of non-degree programs than in programs leading to a degree or certificate. The change agent working in labour education should be granted considerable autonomy by the administration to avoid delays in decision making. Labour education must respond to immediate needs. Currently pressing economic, social or political concerns should form the basis for program planning (Roberts, 1975). Delayed reaction results in lost opportunities.

University Extension's personnel experience great demands on their time. There is no program co-ordinator with expertise in labour education. The obvious strategy for eliminating personnel problems is to hire a person for

the sole purpose of developing a labour education program. However, the financial constraints of the institution render this strategy impracticable. The obstacle can be alleviated if there is a person on staff who has a genuine interest in labour education who would be willing to develop an expertise and create time to establish a relationship with the labour community.

The University's Division of Extension is presently experiencing financial constraints. Imaginative use of available union resources may go far in alleviating financial problems felt by the University. The University could also explore the possibility of getting additional monies through grants. One postsecondary institution, for instance, was able recently to assist a union with a proposal for grant money for a research project in the area of Technological Change. Part of the grant monies requested were to enable the union to employ the services of the postsecondary institution. Labour Canada last year offered a sizeable grant to persons involved in studies associated with the labour movement. Careful investigation could open up other possible sources, including employer contributions.

The difficulty experienced by the Division of Extension to establish a program in labour education in the past has resulted in a reluctance to try again. A careful analysis of past problems may result in a change of attitude. A view of the new circumstances in which planning

would now occur reveals many changes since the last attempts. Most importantly perhaps, many changes in union leadership have occurred. Havelock (1973) suggests changes in personnel can change the entire process and may result in positively altered prospects for success. Other institutions have reported since on the successful implementation of labour education programs; strategies may be learned from them. The socio-political context has changed, making the process an entirely different one. If a fresh perspective cannot be achieved by the persons previously involved in implementation, then someone who was not involved should make a new attempt.

Generally, the University needs only to capitalize on its current strengths of flexibility in program development and delivery, sincerity in wanting to meet community needs, and its established practice of working with other agencies in order to alleviate obstacles to implementation of a labour education program.

### Innovation

The ideological nature of labour education runs the risk of public criticism. If labour education is going to be approached from an orientation of social reconstruction and aimed at understanding the labour movement, then a change agent is going to have to be sensitive in selecting

and designing the content of the curriculum. Planning a program which would be for non-degree study would allow the flexibility needed. Other strategies have already indicated an issue-centred curriculum would be effective. More specifically, a strategy would be to select an issue such as Technological Change or Unemployment and design a program which involves characteristics such as co-operative identification of needs, participatory activities, and experiential learning (Knowles, 1980). These issues are current and of immediate concern to all members of the labour community (as well as the general public). The labour community as a whole is affected by the implications and has beliefs and a point of view with regard to them. Finally, the issues are not so essentially controversial that they are likely to raise public ire by providing a forum for the airing of labour's stance. The choice of participatory planning of education ensures the beliefs of the labour community will be recognized. As Werner (1979) indicates, basic philosophical differences between the learner and the innovation make implementation impossible. Participation would be more likely if there were no major contradiction between the views held by union members and those presented in a labour education program.

Labour education is multidisciplinary, making it difficult to find an academic sponsor. The first strategy recommended by those people interviewed who have dealt with

labour education is to achieve some initial agreement among personnel as to the definition and purpose of labour education. Once having established this definition, the next strategy is to build an informal cadre of people committed to labour education in the institution. Lastly, a formal channel needs to be recognized with one department accepting major responsibility for the program. This department should be one used to dealing with essentially political content; obviously political science would be ideal. More importantly however, an individual from the department needs to be committed; if the individual happens to be in sociology then justification for seating labour education in that department should be devised.

Many obstacles to the innovation are avoided by having arrived at a platform or image of labour education early in the implementation process. Many of the postsecondary personnel who were interviewed recalled that a lack of stated purpose for labour education created one of the greatest obstacles to implementation of a program.

The major obstacles to labour education as an innovation can be dealt with by recognizing that true objectivity is achieved by accomodating all points of view. The labour community is entitled to have their point of view acknowledged. Such must be made clear within the institution as well as to its public.

### Socio-Political Context

Variables which make up the social, economic and political context of the implementation process can not easily be manipulated. Rather, a clear description of the situation simply allows a change agent to be cognizant of these factors as they relate to the process. Hence there are no particular strategies devised to deal with the obstacles associated with the socio-political context.

### Summary

Strategies devised are intended to deal with specific obstacles or positive features by minimizing the first and capitalizing on the second. By so doing, it is suggested that a change agent could achieve successful implementation of a labour education program, attended by union members in Greater Victoria and sponsored by the University of Victoria Division of Extension.

Conceptualized as a series of interactions among key elements, the implementation process is not a linear process with steps logically progressing from one to the next. The solutions generated from the process therefore are not ordered to correspond with a sequence for program planning. Rather they would need to be employed by a program planner or change agent using some judgement as to the appropriate sequence.

Strategies may be seen as catering to the labour

community. This is deliberate. The needs of labour have not been met to date by most public institutions in British Columbia. A perusal of the offerings of B.C. colleges and universities reveals a consistently large portion of courses aimed at business and management with virtually none for labour. Records of the Division of Extension show a low percentage of participation from the blue collar worker sector. Remedial action is necessary. Remedial action often requires some positive discrimination. Reporting on a study of the British Open University, Jones (1980) says that positive discrimination may be necessary if non-traditional students are to be encouraged to participate in adult education. A labour education program is intended for an audience of adult learners which includes many adults traditionally identified as non-participants. The University of Victoria, in attempting to meet the needs of the labour community, may need to exercise positive discrimination to encourage participation of the greatest numbers of union members in the labour community.

## Chapter VII

## CONCLUSIONS

This study had two purposes. The first was to develop a theoretical framework for facilitating attempts to increase participation in adult education from theories of implementation described in the curriculum literature. The second purpose of the study was to apply the theory to the hypothetical circumstance of implementing a labour education program for union members in Greater Victoria at the University of Victoria Division of Extension. The study showed, to a somewhat limited degree, the usefulness of applying implementation theory to the problem of participation in adult education. Without completing an actual application, as opposed to the hypothetical application described in the study, it is impossible to conclude whether or not participation would increase as a result of the theoretical framework employed. The hypothetical application does lead to some conclusions about the general theory of implementation as well as the specific circumstance of labour education for University Extension. These are discussed separately.

## Theory

The theoretical framework developed for implementation in adult education provides a systematic approach to the

problem of participation. It allows an adult educator to consider variables of adults as learners known to be associated with participation, material conditions of an institution related to access and constructs observed to be key in the adoption of innovation as they interact. It results in a list of very practical recommendations for successful implementation. It resembles, as Fullan (1980) says, "organized common sense" (p. x). To this extent, the application in the study showed that the theoretical framework involving initial analysis of the components of user, agency and innovation, subsequent identification of obstacles preventing relationships among the components and a final devising of strategies to overcome obstacles may be useful for encouraging participation in new programs of adult education.

Especially the framework appeared useful where the potential users were clearly identifiable as a group with both common interests and a recognizable structure, as was the case in the application involving the labour community. It would be more difficult to apply the framework to an adult education program intended for more general audiences as many of the strategies associated with successful implementation involve constructs such as sponsorship, congruency between innovation and user, and successive approximations, which are more easily identified with a system than with groups of unrelated individuals. There is

some evidence from this study pointing out that such constructs are important where a program involves a specific community. Application of the framework may lead to greater success in implementing programs with groups such as Natives, women and seniors.

The theoretical framework developed in this study is very general, as was the earliest work in implementation theory for public schooling. Leithwood, in 1976 for instance, named eleven stages of implementation which were experientially derived. He added seven constructs theoretically derived which contributed to a more general look at the problem of implementation. His latest work is considerably refined and more sophisticated. Though still describing implementation as action oriented, he says "principles for changing . . . cannot be deduced directly from empirical data" (Leithwood and Montgomery, 1980, p. 4) but must be developed inductively around the concepts of "growth", "system", and "strategies" (p. 5). This more theoretical approach is refined to meet the specific circumstances of educational change in a bureaucratic school system. Refinement is similarly necessary in order for the framework developed in this study to be more useful for the specific circumstances of adult education program planning. The framework developed in the study should be considered as a rudimentary attempt to adapt what is known about educational change in public schooling to an adult education

problem. Further work on the framework involving refinement of the constructs and specific data from adult education settings is indicated.

One particular modification of the theory was shown to be necessary from the application described in the study. The framework originally did not specifically allow for the identification of positive features which would encourage implementation. The study of the labour community, University of Victoria Extension and labour education revealed a number of features of each of these elements which could positively influence a relationship among the elements. Such positive features need to be considered and identified from analysis of the interactions between the elements. Strategies then may be devised not only from a view of the obstacles but from studying the strengths on which a relationship could be built. The application showed these strengths useful for devising strategies.

#### Application

Specific descriptions generated from the application of implementation theory to labour education at University Extension are a good indication of the kinds of circumstances in which a change agent would have to work in order to plan a labour education program. The obstacles identified and strategies devised as a result of the descriptions would not normally be part of a typical program

planning agenda. For instance, most adult education manuals recommend conducting a needs assessment as a starting point for planning. It is apparent from this study that a typical needs assessment would not generate the sort of description of the user as system and as individuals arrived at from use of the theoretical framework developed here. It is further apparent that without the description, it would be difficult, if not impossible, to achieve a successful relationship among the labour community, the University Division of Extension and labour education.

The study cannot conclude that applying implementation theory to a labour education program sponsored by the University of Victoria Division of Extension would result in a successful relationship. It does show that the more systematic approach set forth in the framework would go further toward building a relationship which would ensure participation of the labour community, than more traditional approaches to program planning.

The present illustration of the theoretical framework as applied to adult education planning has been laborious if not tedious. There is no thought of suggesting that such an extensive report be employed for each planning situation. The reporting procedure could be abbreviated by reducing the reporting style, using outlines rather than lengthy prose reports, developing instruments for concise descriptions, and identifying obstacles on prepared forms with corresponding

sections for strategies, for examples. This illustration has been intended to lead to a full understanding of the framework. The extensive analysis if applied to an actual rather than hypothetical circumstance may result in successful implementation of new programs in adult education.

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APPENDICES

## Appendix A

## User System: A Detailed Inventory

Structure

1. Is there a formal structure or organization which should be acknowledged?
2. Who are the formal or recognized leaders?
3. With whom should a change agent deal in relation to the proposed project? Who has final authority?
4. How should the change agent enlist the cooperation of others? Are there formal channels to follow?

Policies

1. Are there any formal or accepted policies with regard to education?
2. Are there any general policies which need to be adhered to in order to achieve the goals?

Resources

1. Are there people in the system who have time to devote to an educational project?
2. What (if any) funds are available for the project?  
(Development, presentation, recruitment, materials, sponsoring students, etc.)?
3. Is there an extant communication network which could be used for the purposes of the project?

Common Values and Beliefs

1. What are your beliefs as representatives of the labour community as they pertain to labour education? (eg. Purpose?)
2. What are your beliefs as they pertain to the University of Victoria Extension Division as the agency offering a labour education program?

## Appendix B

Population of Union Members  
in Greater VictoriaNotes

1. Locals listed are only those affiliated with the B.C. Federation of Labour and the Canadian Labour Congress.. Independent Locals or those affiliated with the Confederation of Canadian Unions are considered by the established Labour Movement to be "outlaws". Any dealings with the outlaws can jeopardize support of the established Labour Movement. The one exception to this is the Construction or Building Trades component of Labour. While they have broken away from the Canadian Labour Congress over political differences, they are not considered complete outlaws.
2. Some Unions organize their Locals on a province-wide basis. While they may have some members in Victoria, their structure makes it difficult to locate them as a discrete unit. For this reason they have not been included.
3. All figures are from the Labour Directory, 1983 as compiled by the B.C. Ministry of Labour.

## Public Sector

No. of Locals	Union	No. of Members
1	Canadian Airline Employees Association (CALEA)	24
11	B.C. Government Employees' Union (BCGEU)	8669
14	Canadian Union of Public Employees (CUPE)	3380
3	International Association of Fire Fighters (IAFF)	132
1	Letter Carriers Union of Canada (LCUC)	370
1	Canadian Union of Postal Workers (CUPW)	295
31	TOTAL	12,870

## Industrial/Commercial

No. of Locals	Union	No. of Members
1	Brotherhood of Railway, Airline and Steamship Clerks, Freight Handlers, Express and Station Employees (BRAC)	130
1	Canadian Brotherhood of Railway, Transport and General Workers (CBRT)	240
1	Canadian Paperworker's Union (CPU)	13
2	United Fishermen and Allied Workers (UFAWU)	139
1	International Woodworkers of America (IWA)	358
2	International Association of Machinists and Aerospace Workers (IAM)	265
1	National Association of Broadcast Employees and Technicians (NABET)	77
1	Newspaper Guild	179
1	Shipyard General Worker's Federation of B.C.	94
1	United Steelworkers of America (USWA)	60
3	Telecommunications Workers Union (TWU)	740
1	International Typographical Union (ITU)	32
1	American Federation of Musicians of the United States and Canada	391
17	TOTAL	2718

## Construction

No. of Locals	Union	No. of Members
1	Boilermakers	556
1	Carpenters	1286
1	Ironworkers International Association of Bridge, Structural and Ornamental Workers	125
1	Labourers International Union of North America	105
1	Painters	423
1	Plumbers	494
6	TOTAL	2989

TOTALS	LOCALS	MEMBERS
Public Sector	31	12,870
Industrial/Commercial	17	2,718
Construction	6	2,989
	54	18,577

## Appendix C

**Greetings!**

*Your co-operation in completing the following survey will be greatly appreciated. The information will be compiled for use in my Masters Thesis which deals in part, with labour education and postsecondary institutions. My thesis which will be called "Increasing Participation in Adult Education: Theory and Application" is the final requirement for completion of a Masters Degree from the University of Victoria.*

*Please be assured that your participation is voluntary and that you need not identify yourself on the survey. The information is strictly for use in my thesis and your participation or non-participation is of concern only to me.*

*I thank you in advance for your assistance in this project.*

*Yours sincerely,*



*Valerie Johnson  
(Graduate Student, University  
of Victoria; Member, Alberta  
Union of Provincial Employees)*

Please put a check in the appropriate box (  ) for each of the following questions.

- |                      |                            |                          |
|----------------------|----------------------------|--------------------------|
| 1. Sex:              | Male                       | <input type="checkbox"/> |
|                      | Female                     | <input type="checkbox"/> |
| 2. Age:              | 18 - 24                    | <input type="checkbox"/> |
|                      | 25 - 29                    | <input type="checkbox"/> |
|                      | 30 - 34                    | <input type="checkbox"/> |
|                      | 35 - 44                    | <input type="checkbox"/> |
|                      | 45 - 54                    | <input type="checkbox"/> |
|                      | 55 plus                    | <input type="checkbox"/> |
| 3. Marital Status:   | Single                     | <input type="checkbox"/> |
|                      | Married:                   | <input type="checkbox"/> |
|                      | Separated/Divorced/Widowed | <input type="checkbox"/> |
| 4. Formal Schooling: | 1 - 8 years                | <input type="checkbox"/> |
|                      | 9 - 11                     | <input type="checkbox"/> |
|                      | 12                         | <input type="checkbox"/> |
|                      | some postsecondary         | <input type="checkbox"/> |
|                      | graduate of postsecondary  | <input type="checkbox"/> |

5. Occupation: unskilled/semiskilled   
 skilled   
 sales/clerical/service   
 professional
6. Have you participated in any education programs since you entered the workforce? Yes  No
7. If so, what was the most recent (or course, workshop, seminar, etc.) in which you participated?  
 \_\_\_\_\_
8. Who conducted or sponsored the program?  
 a) the employer   
 b) the union   
 c) a formal education institution   
 d) other (name)  \_\_\_\_\_
9. Which of the following reasons have made it difficult for you to take courses in the past or might prevent you from taking courses in the future? Check all that may apply:
- |  |                          |
|--|--------------------------|
| Courses are not worthwhile                     | <input type="checkbox"/> |
| Courses are not offered in the right location  | <input type="checkbox"/> |
| Courses offered at the wrong time              | <input type="checkbox"/> |
| Not enough information about courses           | <input type="checkbox"/> |
| Not enough time                                | <input type="checkbox"/> |
| Cost (books, tuition, child care)              | <input type="checkbox"/> |
| Time required to complete program              | <input type="checkbox"/> |
| Strict attendance requirements                 | <input type="checkbox"/> |
| No child care                                  | <input type="checkbox"/> |
| No transportation                              | <input type="checkbox"/> |
| Home responsibilities                          | <input type="checkbox"/> |
| Job responsibilities                           | <input type="checkbox"/> |
| Not enough energy; too tired                   | <input type="checkbox"/> |
| Afraid I'm too old to begin                    | <input type="checkbox"/> |
| Don't meet requirements to begin program       | <input type="checkbox"/> |
| Don't enjoy studying or taking tests           | <input type="checkbox"/> |
| Not likely to hear about opportunities         | <input type="checkbox"/> |
| Employer does not encourage me to take courses | <input type="checkbox"/> |
| Union does not encourage me to take courses    | <input type="checkbox"/> |
| Afraid I might fail the course                 | <input type="checkbox"/> |

Thank you again!

## Appendix D

## Agency: A Detailed Inventory

Structure

1. Is there a formal procedure for course or program acceptance? If so, what is the procedure?
2. What sort of autonomy does a program developer have in terms of delivering a program?
3. Who initiates program development?
4. Do you work with other agencies in order to establish programs?

Policies

1. Who establishes policy?
2. Are there any formal or accepted academic standards for non credit offerings in the agency? Are they flexible?
3. What are the formal requisites for credit courses?
4. How are priorities established in terms of course offerings?
5. What is the minimum acceptable enrollment required for a course to continue?
6. How are instructors recruited?
7. Is the agency flexible in terms of?
  - a) delivery method
  - b) curriculum content
  - c) location

8. Do you offer any of the following services to students interested in non credit offerings?

- a) library
- b) extended hours of bookstore
- c) educational counseling
- d) child care

Resources

- 1. How are the agency's programs funded?
- 2. Do you have personnel with time to devote to implementing an innovation?

Common Beliefs or Values

- 1. What are your beliefs, as representatives of University Extension, as they pertain to labour education? (eg. Purpose?)
- 2. What are your beliefs as they pertain to the labour community as a "client" of your services?

## Appendix E

## Interview Protocol

(for use with personnel from Labour Education programs  
in Postsecondary)

Users

Are there any features of the Labour community which make it a unique group to work with in an educational planning situation? How did you deal with problem?

Can you see any or did you meet with any obstacles in recruiting students to the program? Did the "type" of potential student present an obstacle? What attempts (if any) did you make to alleviate the problems?

Institutions

Did your institution present any problems to the planning? Financial? Administrative? Faculty? Organizational? Ideological?

Labour Education

There are several contradictory opinions of the nature of Labour Education, did you have to meet any obstacles as a result of these differences?

VITA

Surname: Johnson Given Names: Valerie Joan

Place of Birth: Winnipeg, Manitoba Date: February 28, 1951

Educational Institutions Attended/Dates Entering and  
Leaving:

University of British Columbia 1969 to 1974

University of Victoria 1983 to 1985

\_\_\_\_\_ to \_\_\_\_\_

\_\_\_\_\_ to \_\_\_\_\_

Degrees, Diplomas Awards:

B. Ed. 1974 University of British Columbia, Vancouver

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Honors and Awards:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Publications:

\_\_\_\_\_

\_\_\_\_\_



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THEORY AND APPLICATION

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12/04/85  
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