Chapter 23
The Institutionalisation of Lifelong Learning in Australia, Hong Kong and the United States: A Bridge to the Community or a Competitor to the University?

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Introduction

The term 'lifelong learning' appears on the surface to be as innocuous as it is self-evident. By the turn of the century however, it had become a contested concept embedded into debates and anxieties around the role and function of education. It is for example a key concept in attempts, in particular by governments, to re-engineer the relationship between education and economic development. Models have emerged, such as the knowledge economy, and as a result the traditional boundaries between formal, informal and non-formal education have become more fluid. This presents a number of challenges in the form of threats and opportunities to the formal university sector. As pointed out by Aspin and Chapman (2007), over the last three decades the idea of lifelong learning has been mentioned by a number of key policy documents, such as the 1972 Fauré Committee Report to UNESCO entitled *Learning to Be: The World of Education for Today and Tomorrow* (Faure et al. 1972); the 1996 OECD ministerial report entitled *Lifelong Learning a Reality for All* (OECD 1996); the 1996 Delors Report to UNESCO entitled *Learning: The Treasure Within* (Delors et al. 1996) and the 2007 OECD report on nine policy responses to lifelong learning entitled *Qualifications Systems: Bridges to Lifelong Learning* (OECD 2007). The advent of the notion of lifelong learning is idealistic, for example, in societal terms, being regarded as a means to achieve economic advancement, an inclusive and democratic society and personal autonomy and

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choice, through the provision of diversified pathways within the education system. These pathways are viewed as a means to avoid invidious choice between selection by ability, which increases the number of academic failures and the risk of exclusion, and the same education for all approach, which can inhibit talent (as described in the Delors Report) (Aspin and Chapman 2007). In personal terms, the idea of lifelong learning promotes and requires self-directed learning motivation (Medel-Añonuevo et al. 2001, Art. 5), according to what individual learners will learn as needed, in response to changing market needs.

Although being presented as idealistic, the idea of lifelong learning also emerges as *pragmatic*. There is a passive and responsive side to lifelong learning. Where it becomes commonly viewed as the means to build a strong knowledge economy, the perceived role of lifelong learning shifts to that of service, responding to workplace needs and, as job cycles quicken, the continual re-education of the workforce. Lifelong learning units become a necessity as the conventional education system cannot provide the manpower needed for such swiftly changing market needs. Taken to the extreme, given the emergence of such economic and societal circumstances, the development of lifelong learning becomes essential. Even in Asia where lifelong learning is an imported idea, its necessity for lifelong learning is often advocated in relation to the frequency of job changes and the decline of job security (Lee 2007). For example, in Japan, a report on lifelong learning pointed out that without lifetime employment, Japanese companies no longer provide on-the-job occupational skill development, as they did in the past as a common practice. Skill upgrading has become an individual responsibility. A new market demand for retraining (or lifelong learning) has been created, and universities start to open their doors to such people's need to continue learning work-related knowledge and technology by developing flexible education delivery systems (Yamada et al. 2003). In China, Han (2003) noted that 3,000 types of occupations disappeared in 2003 as compared to 1998, and only less than one-third of the recruitments in spring of that year were without explicit technical and/or qualification requirements. In 2000, one-fourth of the workforce aged 16–35 had changed their jobs. The strategic adjustment of the industrial structure in China, and the large-scale mobilisation of the workforces among different trades and professions, especially the redundant cheap labour from traditional labour-intensive industries, have made the needs of pre-job training, on-job training, job-shifting training, and continuing education after school education growing as never before. In Singapore, 33.4% of residents aged 15–64 were engaged in some form of job-related structured training in 2000. In Hong Kong, 14.6% of 15–50-year olds had attended job-related training arranged by employers and/or on their own initiatives during the year 2002 (Census and Statistics Department, Hong Kong 2003). In Korea, data from the Vocational Ability Development Programme (VADP) suggest that 4.4% of the 15–64 age group received training in 1999 and 7.0% in 2001. During this period, the number of participants increased by 60% (International Labour Office (ILO) 2004).

Focusing on the responsibility of the individual to prepare oneself to face changing workplace requirements, lifelong learning is a concept distinguishable from its earlier term 'lifelong education' (Duke 2002). Lifelong education in the early 1970s

was associated with a more comprehensive and integrated strategy to develop the capacity of individuals and communities to face rapid social change (Medel-Añonuevo et al. 2001). This was a more provider-led model of learning activity (Preece 2005). In the 1990s, as elaborated by the Delors Report (1996, p. 18), lifelong education attempted to 'reconcile three forces: competition, which provides incentives; co-operation which gives strength; and solidarity, which unites'. In sum, lifelong education is more focused on strategic provision of education with more emphasis on the structures and institutions of learning. The concepts of continuing education and adult education are more in line with those of lifelong education. Continuing education usually refers to short-term, programme- and qualification-related post-compulsory education (Harvey 2004). Adult education has been described as a set of organised activities carried on by a wide variety of institutions for the accomplishment of specific educational objectives (Knowles 1980), improvement of technical or professional qualifications (UNESCO 1980), with more emphasis on the action of an external educational agent purposefully ordering behaviour into planned systematic experiences (Verner 1962).

However, the more dominant interpretation of lifelong learning in the 1990s was linked to retraining and learning new skills that would enable individuals to cope with the demands of the rapidly changing workplace. It also seems that lifelong learning as it is presently promoted has become more individual orientated, whereas lifelong education often referred back to the community. The emphasis of lifelong learning on the learner could also be interpreted as assigning more agencies to individuals in contrast to lifelong education's thrust on structures and institutions (Medel-Añonuevo et al. 2001).

It may be more appropriate to say that the shift in terminology (from lifelong education, continuing education and adult education to lifelong learning) reflects a conceptual departure from organised educational provision to the individualised pursuit of learning. The former emphasises organisations and central strategies of provision with the decisions on what is to be taught residing within the organisation. The latter emphasises self-agency and self-motivation on the part of the individual to learn what is required for his or her own adaptation to a world in perpetual transition. This conceptual shift facilitates the growth of an education service industry developed around meeting, or responding to, the learners' needs (Young and Ng 2000). More broadly, the former emphasises structures, and the latter emphasises culture. The former emphasises state-led provision, and the latter private initiatives. In relation to this, the state has been criticised for abdicating its responsibility to provide both educational and economic opportunities (Kennedy and Sweeting 2003; Medel-Añonuevo et al. 2001).

Institutionalising Lifelong Learning in Higher Education

Although lifelong education began as an informal mode of learning, the rapid growth in its popularity as an alternative learning pathway has led to its institutionalisation.

Increasing numbers of academic institutions and private providers offer courses that lead to a sub-degree qualification which in some instances can accumulate towards academic qualifications offered by traditional universities or other higher education institutions. This can be demonstrated by the emergence of the Credit Bank System in South Korea (UNESCO APPEAL 2001), the Credit Transfer and Accumulation System in European Union (European Commission 2004) and the National Qualifications Framework in Australia. This makes lifelong learning move from an entirely informal way of learning (by which every person acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment) towards becoming non-formal (as any organised, systematic, educational activity carried on outside the framework of the formal system) and finally resembling formal education (highly institutionalised and hierarchically structured) (Coombs and Ahmed 1974).

Where there are sufficient individual demands for lifelong learning, as a market force, there will be providers to meet these demands. As noted by Aspin et al. (2001b), lifelong learning has been offered by both traditional and non-traditional institutions and agencies in the community. Duke (2002, p. 11) further points out that lifelong learning in the twenty-first century 'has become popular and "commercially viable", not just in the United States where it entered common parlance earlier but globally'. What is more, lifelong learning has become an educational policy of many governments of today. The growth of lifelong learning has at the same time led to the growth of institutionalisation, to the degree that the difference between the former more organised lifelong education and the latter more individualised lifelong learning has become blurred (Duke 2002; Aspin et al. 2001b).

Moreover, reviewing the development of lifelong learning in Asian countries and the centralised efforts in organising learning activities or courses, lifelong learning in Asian countries tends to be closer to the traditional concepts of lifelong education, continuing education and/or adult education (Lee 2007). This is particularly revealed from a comment that 'The Japanese government believes that, in order to promote lifelong learning in Japan, institutions of formal education should play an important role in offering a basis of lifelong learning' (ASEM-Lifelong Learning 2002).

The institutionalisation of lifelong learning has led to a multifaceted, and sometimes paradoxical, development of the field. Although starting with a focus on individual initiatives and thus learning is informal, the institutionalisation effect offers a formal structure for learning, and the divide between formal and non-formal education has become unclear. There are authors arguing that it is actually difficult to draw a line between them, as there can be formal elements in informal/non-formal education, and vice versa. As Duke (2001, p. 510) has acutely put it, lifelong learning 'can be a matrix with formal and non-formal education'. Aspin et al. (2001b, p. xliii) also argue that the distinctions between the traditional divisions of education (primary, secondary and tertiary/higher) become less important, as lifelong learning 'presupposes an integrated, holistic and seamless approach to the whole of education'. Rogers' (2004) study of the relationship between formal and non-formal education can be useful for the discussion here, as he conceives a continuum rather

Table 23.1 The relationship between formal and non-formal education

Learning mode	Formal schooling	Flexible schooling	Participatory education
Context	Decontextualised	Context adjusted	Contextualised
Education type	Formal education	Non-formal education	Informal education

Source: Constructed, based on Rogers (2004, pp. 255–260)

than a dichotomy between the two types of education, depending upon the degree of participatory and contextualised learning on the one hand, and formal and decontextualised learning on the other (see Table 23.1).

A number of questions arise when lifelong learning becomes institutionalised:

- What is the resemblance between informal/non-formal lifelong learning and education that takes place in traditional academic institutions?
- What is the function and role of lifelong learning in meeting market needs or community needs on the one hand, and providing education and learning which resembles that of traditional academic institutions on the other?
- How will the institutionalisation of lifelong learning alter the higher education landscape?
- What are the concerns of these institutions, when offering lifelong learning programmes, especially when compared with the academic institutions?
- How will the relationship between traditional academic institutions and lifelong learning units be affected as the latter becomes more formalised and performs academic functions?

This chapter will consider these questions by examining the changing role of lifelong learning units which reside within traditional academic institutions.

Blurring the Boundaries: Knowledge Production by Lifelong Learning Units in Higher Education

The concept of lifelong learning has emerged in this century as a major policy strand of higher education institutions and governments worldwide. It has, however, arguably influenced the shape and direction of higher education for a much longer period. With the establishment of extramural education, universities offered lifelong education in a non-formal mode since the late 1800s. The British tradition was focused on the liberal arts and offering a 'proper' education to those previously denied access. The American agricultural extension tradition was based around providing 'a useful education' (Williams 1991), which was vocationally orientated and was expected to be self-supporting from the outset (Knowles 1994, p. 87). Both traditions regarded these extramural activities as separate to the core academic mission of the university with no institutionalised means for learners to transition from non-award into award programmes. As such there were debates about the appropriateness of using university

resources for those outside the formal academic programmes. From the 1980s, demands were made on universities worldwide to drastically increase student numbers while at the same time they were expected to survive on reduced funding (see for example Marginson and Considine 2000; Mok and Tan 2004; Slaughter and Leslie 1997). This led to a reassessment by cash-strapped universities of what they regarded as 'non-core' activities. Continuing and professional education units began to replace former extension units with the directive to become self-financed and even profit centres. Thus, as teaching-only units they became dependent on enrolments for their survival, and by focusing attention on responding to the educational needs of those outside the academic institutions they ceded some power to the learners. As their popularity increased so did their range of programmes expand to the point where units in some countries, including the United States and Hong Kong, offered courses which built towards academic qualifications like those offered by their traditional parent universities. They provided an alternative learning pathway which had become increasingly institutionalised, and in some cases their students outnumbered those enrolled in the university's core academic programmes.

The growing presence of lifelong learning units within universities challenges the definition of what constitutes legitimate knowledge within the context of higher education. Once these units become institutionalised, they have a formal claim towards knowledge building. Cervero (2006, p. 171) challenges the tradition of ascribing legitimacy to knowledge that is 'formal, abstract and general' while devaluing that which is 'local, specific and based in practice'. This has had the effect of transferring learning from the place of practice to the university. He argues, for example, that continuing education should be more practice orientated, emphasising the importance of developing professional action. Murphy and Fleming claim that a central focus of lifelong learning has been the recognition of prior experience and that this puts lifelong learning in a fundamental conflict with traditional higher education which devalues experiential knowledge and instead gives status to general and abstract knowledge (Murphy and Fleming 2000). Tennant and Morris (2001), however, argue that shifts in rhetoric and policy place an increasing emphasis on the importance of experiential knowledge and the application of knowledge to problems.

A common theme that emerges is the changed status of knowledge within the context of higher education, with legitimacy no longer solely defined by the university. Related to this, universities can no longer afford to isolate themselves from the community, and arguably their lifelong learning units have an increasingly important role to play in community engagement (Fleming 2008a). The idea of a 'knowledge economy' has gained currency in particular with governments keen to hold universities accountable to the State (see for example Bradley et al. 2008; Robbins 2007; U.S. Department of Education 2006, p. XII), emphasising their critical role in 'the economy's supply capacity' (The Federal Government of Australia 2007). This changing and sometimes unwilling relationship of the university to outside communities 'raises sharp epistemological questions' which has led to a reassessment of the criteria used to judge legitimacy or validity within the context of universities (Barnett 2004). It has also been a period when new providers have entered the field, and as a consequence universities are no longer the sole providers of high status knowledge.

Knowledge Contribution from the Periphery: Moving from a Bridge with the Community to the Academic Core

However, concerns have been raised over the growing influence and demands of outside communities on the academic research and teaching agenda of universities. Terms such as 'epistemic drift' (Elzinga 1985; Kogan 2005) and 'mission creep' (Duderstadt 2000; Duderstadt and Womack 2003) emphasise the implications of responding to these external demands while straying too far from fundamental academic values such as pure and independent research and teaching full-time students and future scholars (Bok 2003). While Duderstadt and Womack (2003) assert that universities will need to adapt to the demands of lifelong learning, they caution that there are tensions inherent in meeting diverse needs and expectations and argue that universities must resist the pressure to undertake commercially successful but peripheral activities that are not aligned with core academic missions. Nowotny et al. (2001, p. 75), however, note that 'every "periphery" shares with its "centre" a special kind of relationship, which may be one of diffusion or imitation but may also be one of aspiration, of moving in closer'.

Lifelong learning providers have always relied on what Nowotny et al. (2001) define as 'social robust' knowledge which is characteristic of Mode-2 knowledge. Their educational programmes are highly contextualised, and their relevance to real-world educational needs make them appealing to communities outside the university. Bagnall (1992) noted that whereas education is regarded as having intrinsic value for those programmes within universities, its value is regarded as extrinsic for those outside. Lifelong learning generally emphasises the connection between knowledge and application, a connection that is not always tied to the workplace. Learning a language for instance, an area which has attracted growing enrolment numbers in two of the three case studies examined in the current research, is usually promoted in the marketing material for its 'can do' properties, such as being able to communicate while travelling overseas and even improving memory.

Kogan conceptualised knowledge along a spectrum ranging from hard to soft science. Hard science is based in specialist knowledge not accessible to those outside its epistemic community. Soft science is based in application; it emphasises inclusiveness and accessibility. He speculates that the appeal of soft science may well increase as 'consumers demand more power' in knowledge production processes (Kogan 2005, p. 18). The differences between specialist and secular knowledge and the resulting tensions are pivotal to discussions on the place of lifelong learning within the university. In the university, epistemic communities gain power through their specialism, and this power is confirmed through the process of peer evaluation. Their lifelong learning units gain power through being accessible, and significant resources are allocated towards achieving this via targeted research, such as the demand surveys conducted in Hong Kong and the biannual statistical survey published in the United States by the University Continuing Education Association (UCEA, 2006) and detailed marketing strategies (see for example Durkin 2004). This concentration of resources suggests that success is measured in the unit's

ability to develop educational programmes that appeal to community needs (Ashcroft 2006). Focusing on needs in this way is regarded as central to transforming students into consumers and goes hand in hand with strategies to become 'student focused' (Liu and Wan 1999). It is this focus on appealing to student needs which has been a defining feature of lifelong learning that distinguishes it from its precursor, lifelong education (Jarvis 1999).

Lifelong learning units also have the potential to empower universities, which have a tradition of reacting to change rather than directing it. In his study of five successful 'entrepreneurial' universities in Europe, Clark concluded that one of the five 'transforming elements' critical to the success of each of these universities was the presence of an expanded developmental periphery. The developmental periphery, which usually encompasses the work of lifelong learning units, facilitates and accelerates the way universities develop contacts with outside communities. The result is greater control to manage the growing service demands being made on universities as they 'extend, cross, and blur boundaries' (Clark 1998, p. 139).

Case Study of Lifelong Learning Units in Australia, the United States and Hong Kong[1]

To further examine the effects of the institutionalisation of lifelong learning in higher education, this chapter now turns to selective case analysis research recently conducted in three higher education institutions: in the United States, Hong Kong and Australia. The three cases chosen through purposive sampling were one college of professional studies in the United States (The College), one continuing and professional education school in the Hong Kong Special Administrative Region, PRC (The School) and one continuation education centre in Australia (The Centre). These cases were selected after a methodical examination of the web sites of 50 university continuing and professional education units. The cases are known for their work in the field and have high profiles within their external communities. They are self-financed and are attached to established universities with past involvement in non-award lifelong learning through extension education, as summarised in Table 23.2. The cases are illustrative of the potential interactions and tensions experienced by responsive and proactive lifelong learning units which exist within traditional universities. The cases also show whether and how lifelong learning units play a different or similar function and role in their knowledge contribution acting either as a bridge between the university and the community (as a unit on the periphery) or as a competitor with the university (at least partially moving to the core) vying for the attention of the community. The case studies were conducted using qualitative research approaches by means of documentary analysis, semi-structured interviews and site observations. The interviewees included

[1] The fieldwork reported here was conducted by Josephine Fleming in 2007/2009 as part of her ongoing research at the University of Sydney.

Table 23.2 Transition from university extension to continuing and/or professional education (C/PE)

Country	Precursor	CPE established	Financial status
Australia	1980s – extension education	1970s	Extension education funded, continuing education self-funded
United States	1880s – agricultural extension	1910s	Primarily self-funded with increasing expectations of profit sharing
Hong Kong	1950s – extramural education	1980s	Extramural studies partially funded, continuing and professional education profit sharing

key decision makers such as the head, programme directors and advisory committee members. Documentation analysis included institutional documents (such as strategic plans, annual reports, programme proposals and programme evaluation documents) and marketing materials.

The Institutional Setting of the Case Studies

The College's university was founded in the United States in the early 1800s as a private university, and from its inception aimed to educate students in practice as well as theory. The university always had a close relationship with its local community, and established disciplinary areas and curriculum that unashamedly focused on meeting the quite specific needs of this community. The Head of The College began work at the university in the 1990s, with the responsibility to draw together the disparate non-award activities and to make them more profitable. He achieved results in a remarkably short period of time and soon became Associate Vice President of Academic Development and Continuing Education. With the encouragement of the Vice President for Academic Affairs, he put forward a plan to establish a college of professional studies, which he argued was an area about to assume a central and profitable role in higher education. His strategy to achieve this was significant – to embed The College, within the university's governance structures.

> This was actually an initiative built on a conceptual narrative that I constructed which was about the potential of a new enterprising, entrepreneurial unit that could foster both academic initiative plus some business ventures to create resources for the University but also to extend the intellectual footprint of the University into the community, engage new audiences, attract students otherwise inaccessible to the institution … and so this was a unit that would not compete with or be redundant with the existing University. (*Personal correspondence)*

The proposal to establish The College met with some resistance particularly around concerns over academic standards, allocations of revenues and programme competition. As one respondent noted, there were some 'very tense' discussions. The College was established in 2001 as a self-financing college with degree-granting status and with the full authority to hire non-tenured faculty.

The School's university was a leading Asian university, focused on the education of high achieving matriculation students with no provision in its early years for extramural or part-time studies. The government-funded university sector in Hong Kong was and arguably remains elitist. In 1951, Hong Kong's Committee on Higher Education issued a report which argued that Hong Kong's higher education institutions needed to focus more on the economic future of Hong Kong, preparing its citizens for the challenges ahead. In that same decade, the university established a department of extramural studies and began offering liberal arts and vocational programmes. From its inception, there were tensions over its status within the university and the head was initially excluded from participation in the senate.

In 1986, a former dean of the university's faculty of arts was appointed as The School's first Chinese Director. In appointing a senior academic who also had, as it turned out, entrepreneurial abilities, the university had, whether intentionally or otherwise, set The School on a path of rapid growth. With a newfound confidence, The School showed little of its previous concern of being marginalised. He recalls his reactions on taking up the position:

> Then looking at the shop, that's traditional English adult education, so that, well that's not so good (laugh). We should strategically think of new developments, that's not the, what's the word, that's not the right ethos. It should also be enhanced by opportunities in international education. So that's how I started. (*Personal correspondence*)

The head (at the time of the fieldwork) had also held senior academic positions. He grasped the central role that continuing education could assume as Hong Kong restructured its economy around the service sector and he was determined to further extend the types of programmes The School offered. The School had become an increasingly important source of income for the university through the rental of facilities and other administrative fees it pays to the university and the direct income contribution it makes to funding university-wide activities such as research.

The Centre's parent university was a leading Australian research university, also referred to as a 'sandstone university', a term used not only to identify age through the early sandstone buildings, but also as a metaphor for a long; some argue conservative, academic tradition. The university had been instrumental in the development of university adult education in Australia with the first extension lectures held in the late nineteenth century. In the 1960s, the university established and funded an adult education department which became home to the university's various extension activities. The position of director was classed as academic and answered directly to the vice chancellor. The 1970s, however, became a time of financial hardship for universities in Australia following the contraction of government funding. Ambivalence was expressed by some academic staff towards funding 'non-core' activities such as extension education. A working party convened in the late 1970s to

review the university's adult education activities recommended restructuring the department into an administrative unit. Shortly following these recommendations, a report from the Australian Tertiary Education Commission concluded that extension activities should directly relate to the disciplines taught within the parent university, thus giving an indication of the explicitly literal way that alignment has been defined within the Australian context. The Centre was established in the following decade on the recommendation of the university's senate to increase revenue, discontinue the appointment of academic staff and emphasise continuing and professional education. The position of head was classified as managerial, and The Centre was given a clear directive to become self-financed, which it did within 5 years.

Mission or Missing: The Relationship of Lifelong Learning to University Mission

The chapter now reports on the findings of a documentary analysis that was undertaken on the mission statements of the three universities. This analysis was framed by three interrelated questions: What is the academic mission of each university? How does each university position its relationship with the wider community as part of this mission? In what ways does the work of each unit reflect or not reflect this mission and in what ways can it be seen to be shaped by this mission? The purpose here is to investigate whether lifelong learning and the notion of community connectedness form a natural part of the mission of each university and how this relates to the academic mission.

The analysis reveals that The College and The School operated on an 'extended developmental periphery' which connected university to external community in line with their universities' mission. The operations of The Centre, however, were not identified as part of its university's mission, and therefore could be more accurately defined as taking place on the margins, in as much as its operations were 'marginalised'. The relevant strands of the mission statements are summarised in Table 23.3.

Academic Mission of the Universities

The differences in academic missions across the three universities are significant. The academic mission of The College's parent university emphasised connectedness in its choice of words – 'dissemination', 'integrative' and 'linkage'. It made this connectedness explicit in two instances – 'To emphasise the linkage between basic and applied scholarship' and 'To draw upon the rich array of resources' from the surrounding community 'to enhance' its educational work. This language suggests a dynamic periphery where the university and external communities interact, an

Table 23.3 Mission statements of the case universities

Statement	United States	Hong Kong	Australia
1. References to academic mission	The university commits itself to excellence in the creation, dissemination and application of knowledge **To promote the process of lifelong learning from both global and integrative perspectives** To offer outstanding learning experiences for full-time and part-time students in undergraduate, graduate and professional programmes To emphasise the linkage between basic and applied scholarship, insisting that the practical be grounded in knowledge and theory To draw upon the rich array of resources from the National Capital Area to enhance the university's educational endeavours	To advance constantly the bounds of scholarship, building upon its proud traditions and strengths To provide a comprehensive education, developing fully the intellectual and personal strengths of its students while **developing and extending lifelong learning opportunities for the community** To produce graduates of distinction committed to lifelong learning, integrity and professionalism, capable of being responsive leaders and communicators in their fields To engage in innovative, high-impact and leading-edge research within and across disciplines To serve as a focal point of intellectual and academic endeavour in Hong Kong, China and Asia and act as a gateway and forum for scholarship with the rest of the world	A fundamental moral commitment to intellectual discovery and development, responsible social commentary and the promotion of cultural and economic well-being. **To combine humane aspirations with a practical business sense to serve the needs of the community while preserving academic freedom.** What 'we' choose to research and teach is ultimately determined by that purpose To deliver the highest levels of achievement in everything we do at a national and international level
2. References to the university's connection to the wider community (in order)	To act as a catalyst for creativity in the arts, the sciences and the professions by encouraging interaction among its students, faculty, staff, alumni and the communities it serves	**Developing and extending lifelong learning opportunities for the community** To act in partnership with the community over the generation, dissemination and application of knowledge	**Purpose** **To combine humane aspirations with a practical business sense to serve the needs of the community while preserving academic freedom**

(continued)

Table 23.3 (continued)

Statement	United States	Hong Kong	Australia
	To promote the process of lifelong learning from both global and integrative perspectives To contribute talent and knowledge to improve the quality of life in metropolitan Washington, D.C.		**Values** Responsibility and service through leadership in the community

Source: Based on the mission statements of the three cases with our emphasis added

idea which permeated the organisational culture within The College. There were two references to the application of knowledge as part of its academic mission.

There is more sense of separation between university and community in the academic mission of The School's parent university. There is a distinct sense that the university is self-reliant when it comes to advancing scholarship – 'building upon' its traditions and strengths, 'developing and extending' lifelong learning opportunities and being an academic/intellectual 'focal point' and 'gateway'. Lifelong learning was included as part of the university's academic mission. To contextualise this, the university was one of the eight Hong Kong universities publicly funded by the University Grants Committee (UGC). All UGC-funded universities had been assigned differentiated roles that they were expected to fulfil, and this university had set lifelong learning as one of its mandated roles. The research confirmed through interviews with respondents and official documents that the differentiated role was primarily selected by the UGC because of the work of The School.

The statement of purpose by the Australian university was focused on the institution itself; in fact, it was the only mission statement to use the first person and to give the impression that in part its audience was the university rather than a wider public. It emphasised separateness – a commitment to 'social commentary' and 'to serve' community needs while 'preserving academic freedom'. The statement 'We combine humane aspirations with a practical business sense to serve the community' was not attached to an object (e.g. by the fruits of its research) but rather to a condition – academic freedom. Unlike the other two universities, there was no reference to lifelong learning.

Connectedness with the Wider Community

The College's parent university made two statements in reference to communities outside the university; the first was implied rather than directly stated. In the phrases 'acting as a catalyst' and 'encouraging interaction', the university emphasised an

active and guiding role in this interaction. However, it is important to note that as a private university, it was also dependent upon outside communities for survival; it was from these communities that it drew its students and much of its research funding, and therefore its income. These statements were carefully constructed around what was not said as much as what was said, suggesting that if not dependent then at the very least the community had something to gain – if the university had not acted as a catalyst there would have been stasis. A key informant asserted:

> We're bringing new students in that wouldn't be part of [the university] otherwise and that we are providing a pretty important psychological service in demonstrating to the [local] community that [the university] is a good corporate citizen of this town, and I think they realise that that's a pretty important deal.

The statements made by The School's parent university were quite perfunctory. The second statement reads as a contract laying out partners – university and community, and obligations – generation, dissemination and application of knowledge. This may have been in part because of its differentiated role; however, there may also be another cultural level at play here as the university was deeply embedded within the community, and therefore as elite as the university may have proclaimed itself to be, it could not escape its duty to work with and for Hong Kong. The role of The School was therefore critical to the execution of its lifelong learning mission, freeing up the university's core academic units to focus on undertaking high-level research and educating the elite. There were indeed inherent tensions in the relationship between the university (emphasising its elite role) and The School (emphasising accessibility); however, this rather paradoxical relationship was embedded within the mission statement. In the words of The School's head:

> If you ask the average academic what is the mission statement of the university, I don't think they could tell you. (Laugh). But I remind them whenever they talk about the role there are still faculty members saying 'oh competition' and/or 'this is not our business, if you want to do low level stuff leave it to other universities'. I will remind them of the agreed role and mission of the university, which is not only agreed by us but is dictated by the government, by the University Grants Committee…. gradually they come to the conclusion that we serve a very useful purpose for the University. (*Personal correspondence)*

The statements made by The Centre's university in reference to the wider community suggest complexity and underlying tensions. The first statement, to 'combine humane aspirations with a practical business sense', appeared to engage with the liberal arts versus profitability discourse but from a position that normalises the relationship between the two through the use of the word 'practical'. The mission statement linked the idea of doing business to serving community needs and indirectly inferred a financial transaction. The following statement intertwined two discourse strands: service and autonomy, with the former being qualified by the latter. The statement was perhaps a declaration of not relinquishing autonomy (and control) to commercial activities. While 'preserving academic freedom' was a dependant clause, its inclusion suggested this was a sensitive area or at the very least a point that needed to be made. In summary, although this statement appeared to be about a commitment to community service, it was in reality somewhat non-committal.

One key informant commented that he believed that 'community education hasn't been positioned well as a natural part of what a university should be doing' in the case of this university.

These mission statements show that the academic missions of the parent universities encompassed the work of The College and The School, and thus gave their roles legitimacy. For The College, there was consistency between its focus on providing professional degrees and the university's emphasis on both application and theory. For The School, there was a mandated role for the university to develop and extend lifelong learning for the community which was formalised as part of its academic mission. For The Centre, however, there was no clear indication as to its role within the academic mission.

By being engaged with external communities, both The College and The School fulfilled a function that was expected of their respective parent universities. This requirement was not purely idealistic on the part of the universities but rather, as discussed above, was also connected to other imperatives. The interactive engagement that these three cases required to develop programmes in consultation with a variety of external stakeholders, for example, students, employers and professional associations, has in this sense legitimised the programmes. However, the connection to external stakeholders in the case of The Centre was not so clear cut, and the assertion by the university of its will to preserve academic freedom may in fact have been an obstacle to interacting with external communities.

The documentary analysis of the mission statements shows the tension of the lifelong learning units in relation to their parent universities. However, it also shows how the connectedness with the wider community had created the legitimacy of their programmes and an academic role in knowledge production, or at least as a catalyst in the process. The interviews reveal further insights into their role in knowledge production, their unique interpretation of entrepreneurialism and their responsiveness to community needs as a foundation for these new perspectives.

The Emergence of More Open Systems of Knowledge Production

As discussed above, the three lifelong learning units were evolved out of previous non-award extension units within their universities. Extension education was built upon a one-sided perception of community needs, resulting in a one-way flow of ideas from the university to the community, 'established on the unquestioned assumption that the university's accumulated academic tradition and knowledge rightfully gave it sole decision-making powers in academic matters' (Fleming 2008b). Interaction between each unit and its multiple stakeholders was viewed by the respondents as having an impact on their programme decisions. The cases in this study behaved as network hubs, connecting the university with external communities and bringing together market research, practitioner expertise, academic expertise and students.

The College and The School had more formalised structures set in place to facilitate interaction, which was considered essential to making effective programme decisions. Strategies they adopted included establishing subject-specific advisory committees, consulting with students and even, in the case of The School, contributing high-level advice on relevant governmental and industry regulations. All programmes went through formal proposal processes using a standardised template. Each programme had to provide evidence of academic and community needs, market analysis, positioning and articulation in the field, related government policy and target students. This consultative approach highlighted their two-way interaction with external stakeholders as programmes were developed in response to input and then fed back to the community. This served to emphasise the different imperatives of these self-funded lifelong learning units in comparison with the other academic units in their universities.

Tensions arose with the parent university when the lifelong learning unit made decisions that were not considered appropriate. One of the most sensitive areas for The College and The School was being viewed as competitors by the universities' core academic units when their programmes were perceived as being too similar to those offered by the parent university. Both cases were sensitive to this issue because it highlighted their marginality and vulnerability within the power structure of the university. The heads of both units claimed that such concerns were unfounded; however, when they were raised they would consistently withdraw their proposed programme. It is worth noting that there were also examples of programmes developed by The School which were ground breaking and were later co-opted by the university's academic faculties, for example, in law and Chinese medicine. A second tension arose around issues of alignment with the parent university. For example, the parent university would make a judgement from a traditional university perspective whether a programme of their lifelong learning unit would be 'suitable' as a university programme, even though the programme was offered by the extension arm. This issue had greatest impact on The Centre. Resolution in all cases was the suspension of the programme or the withdrawal of the programme proposal. Both these tensions suggested that the interaction with the parent university may have been one-way.

However, even though such tensions exist, the three cases made their own way in justifying knowledge production. The programme leaders in The Centre had two primary strategies: taking guidance from teachers as to content, usually in the form of programme proposals, and using field research to develop ideas. Many of their teachers were professional practitioners rather than academics and in all cases were part-time. The Centre's explanation was that the communities they served expect high standards from the university, and in the context of lifelong learning this equated with employing teachers (and programme developers) who had strong professional rather than academic expertise. Frequently, the teachers developed and assumed ownership of the curriculum, standing in marked contrast to the university's core academic units. Both The School and The College also utilised external professionals to consult with and assist in curriculum development. This challenges the conventional assumption that the university is the sole owner and provider of academic knowledge, especially within its own domain.

The School had sophisticated ways to gather input from outside communities to feed back into programme development. An example was their response to the Hong Kong government's decision to build a large cultural centre: The School contracted a high-profile consultant to lead community consultation and develop related diploma programmes around projected employment needs. The School, like The Centre and in contrast to The College, did not have degree-granting status and had to partner with internal faculties or, more frequently, with overseas universities to offer degree programmes. In these instances, The School did not have control over the curriculum, and tensions arose from time to time particularly over the issue of adapting overseas content to meet local needs. They also offered non-degree programmes that were built around professional qualifications and required validation from professional bodies that are outside the university.

The College had gained degree-granting status, and therefore had the greatest level of academic autonomy among the three cases. Paradoxically, it also had the most deeply embedded internal consultation processes when it came to formulating new programmes. A range of academic faculties regularly participated in generating ideas, and this resulted in some cross-faculty collaborations to develop interdisciplinary practice-based programmes. As discussed by the dean, such cross-fertilisation generated rich sites for 'curricula innovation', and this was made possible because of a 'willingness to think about higher education in a way that is not traditional in terms of being a single discipline'. Significantly, The College soon had an expanded jurisdiction as two departments previously operating in other academic faculties, and were granted the right to transfer across to The College. The programmes of both these departments were practice based. The departments argued that their traditional academic faculties were unable or unwilling to grasp their quite specific imperatives, such as offering flexibility for part-time students who also worked, whereas The College was more closely aligned to their purpose and values. Such a move was only made possible because The College had academic autonomy.

Entrepreneurialism from Lifelong Learning Perspectives

The term 'entrepreneurialism' was initiated by the head of these lifelong learning units in discussions around organisational culture and values. It is an unexpected finding of this study, as the term itself was deliberately never introduced by the interviewer. It was most frequently discussed by the head of The College who referred to entrepreneurialism in each of his three interviews as a core principle which encompassed both economic and academic outcomes. The benefits were both 'resources' (financial) and the expansion of the university's capacity to reach beyond traditional boundaries without sacrificing academic integrity. Entrepreneurialism was explicitly linked to being responsive, having the capacity to take risks and being academically innovative. It was 'the ability and the willingness… to notice opportunities to increase institutional effectiveness'. A number of those interviewed at The College were emphatic that entrepreneurialism was not guided by financial

opportunism, and the distinction between being profit driven and being entrepreneurial was an important one.

Entrepreneurialism was defined somewhat differently by The School. Significantly, the head differentiated being entrepreneurial from being academic, believing both were important but separate. Respondents in The School associated entrepreneurialism with commerce while viewing The School's commitment to academic rigour as setting the parameters within which that commerce took place. The separation of academic and financial imperatives permeated The School's decision-making processes with the academic merits and the financial projections of programme proposals assessed by separate committees to ensure both aspects were considered independently.

Entrepreneurialism was not directly referred to by those interviewed at The Centre except in one instance where the head referred to the need for research universities to have a dynamic periphery which encouraged entrepreneurial activities. The Centre was in fact established on the recommendation that any profits should be reinvested back into programme development, thus recognising the entrepreneurial nature of such a venture in academic rather than financial terms. But whereas entrepreneurialism was not a term shared by respondents in The Centre, the idea of responding to opportunity was seen as a guiding principle.

All the three cases shared an expectation of growth and an understanding that achieving this required the capacity to take leads from the external environment. It was a narrative based around the imperative of being receptive to new opportunities as a founding principle and a financial necessity. This required a culture that was deeply connected to communities outside the institution itself. However, a significant distinction emerged between creating opportunities and responding to opportunities during the analysis of the findings. The distinction between agency and reaction is an issue that is debated at length in the management literature on entrepreneurialism and yet is largely ignored by the literature dealing with entrepreneurialism in higher education. In higher education, entrepreneurialism is almost always associated with commerce even when it is referred to as academic entrepreneurialism (see for example Bok 2003; Marginson and Considine 2000). As Mars argued in his recent discourse analysis of 67 journal articles, 'this slice of higher education literature demonstrates how entrepreneurial terminology has been commonly used in discourse specific to the intersections of the academy as an institutional sector and the private marketplace' (Mars and Rios-Aguilar 2010, p. 6).

Shane and Venkataraman developed a conceptual framework which highlighted the central role played by opportunity in the actions of entrepreneurs. They argued that research into entrepreneurialism should involve 'the study of *sources* of opportunities; the *processes* of discovery, evaluation, and exploitation of opportunities; and the set of *individuals* who discover, evaluate, and exploit them' (*Our emphasis*, Shane and Venkataraman 2000, p. 218). The research presented here focuses on the organisation rather than an individual entrepreneur, although recognising the crucial role played by the head of the lifelong learning unit. However, in accord with their observation, the findings of this study revealed the profound way in which the idea of noticing and responding to opportunities permeated the structures, processes and

Table 23.4 Measures taken by lifelong learning units to identify community needs

Measures taken to respond to or interact with stakeholders	The school	The college	The centre
Relevant external representation on advisory committees and boards	***	***	–
Surveying students on educational needs and programme suggestions	***	***	***
Establishing satellite campuses in locations considered convenient for students	***	***	*
Pre-programme market analysis	***	***	*
Membership of relevant professional and/or academic associations by programme decision makers	**	**	*
Seeking relevant and external professional accreditation of courses	***	**	*
Programme information targeted to specific external communities through communications materials	**	**	**
Commissioning research into community-wide demand for continuing and professional education	**	–	–

Note: *** policy, ** regular practice, * some practice, – not undertaken

indeed culture of each of the case studies. This is significant as it potentially leads to a deeper understanding of the forces that guide decision making within these self-financed units, and hence may yield a better understanding of their role within higher education.

Building a Responsive Culture

The processes of knowledge production and the interlinked concepts of entrepreneurialism and opportunity found in these case studies were closely related to the fundamental nature of lifelong learning – responsiveness to community needs. This was a recurrent theme in the interviews. The self-financed status of the three cases had a profound effect on their organisational culture. This culture had developed around imperatives that were different to their universities' other academic units as they were dependent on income from enrolments. Each case focused attention on communicating interactively with a range of external communities, attempting to make them stakeholders as students, sponsors, collaborators or advisors. They invested significant resources to develop this capacity; as shown in Table 23.4, this was most apparent in The School and The College.

Those interviewed believed it was essential to respond rapidly to changing demands. As the head of The School argued: 'Our attitude is different… we have to respond to the market demand – this is our role, this is our responsibility. So the mindset is entirely different.' Their ability to achieve this was primarily measured through the dimensions of time and flexibility, and often these were interlinked. One of the programme managers from The School, for example, explained that once a

new subject area was 'discovered', there was some urgency in launching a programme before their competitors had the time to do so. This often meant finding 'some way to speed up the process' while upholding standards and quality. The School's complex quality assurance system generated some concern over balancing timely decision making with satisfying QA requirements. The way of resolving these competing demands was often discussed in terms that suggest an adaptive culture which found ways to turn potential impediments into opportunities. In the words of one senior programme director and confirmed by others:

> That's why we have designed some short cuts you know, if we have to go through all these procedures it may take half a year or even more so that's why we have developed something we call executive diploma or executive certificate whereby we can skip some of the steps in the validation process.

The head of The College also cited the importance of 'pre-competitive' programme development and the need for 'an expedited programme development strategy'. Such a strategy was largely achieved by gaining the approval of the university's board of trustees for three new award programmes – the associate, bachelors and masters of *Professional Studies*. In effect, these programmes could specialise in a range of disciplinary areas after gaining approval from the unit's council rather than at board level. Therefore, the unit was able to circumvent the lengthy approval processes demanded of the other academic faculties, making the period from original proposal to validation significantly shorter.

The primary reporting body of The Centre was in theory an advisory committee which met once a term and oversaw academic matters in relation to the programmes. In practice, however, the committee was not directly involved in The Centre's activities and by all accounts 'weren't interested' and saw it as an onerous task rather than a commitment to upholding academic standards. There were no formal processes by which programmes could be validated or reviewed, and yet there were expectations that a systematic and appropriate decision-making strategy should be in place. The Centre initially made decisions at the level of programme leader with nominal sign off given by the head of The Centre. A policy enacted during the period of fieldwork assessed individual courses against a matrix of risk/alignment to the university which created three levels of decision making dependant upon where the course was placed.

This study reveals that placing an emphasis on being responsive can result in a highly adaptive culture. This is not without risk to the university (and to the value of lifelong learning), if responsiveness results in loss of academic autonomy, integrity and transparency. Arguably, as the responsibility for lifelong learning shifts from the state to the individual, enrolment becomes a purchase and students become consumers. As consumers, they exercise tacit and sometimes explicit power in relation to programme decisions. The extent of this power will be largely determined by the parameters of what is and is not acceptable, and this becomes critical as external stakeholders play a growing role in curriculum development. The findings from the current research suggest that the degree the lifelong learning unit was embedded into the culture and governance structures of the university affected the degree of

influence external stakeholders exercised in relation to programme decisions. This is an important issue as those outside the university and not connected to the core mission and values of the university have increasing levels of involvement, and thus would increase the likelihood of conflicted decisions. As this lifelong learning sector expands, there is a growing tension between meeting mission and market imperatives and a critical need to be able to map at what point decision-making shifts from complementing to compromising core values. As asserted by Cervero, 'This process will be marked by fundamental struggles over the educational agenda and the competing interests of the educational agenda and the political-economic agendas of the multiple stakeholders of continuing education' (Cervero 2001, p. 28).

Conclusion: Sectorisation and De-Sectorisation Between the Academy and Lifelong Learning

> Our highly partitioned system of education will blend increasingly into a seamless web, in which primary and secondary education; undergraduate, graduate and professional education; on-the-job training and continuing education; and lifelong enrichment become a continuum (Duderstadt and Womack 2003, p. 210)

Robertson (2010, p. xvii) observes that 'Over the past three decades, education systems around the world have been faced with a series of major structural transformations, with the borders and boundaries around the "state," the "nation", the "sector," the "citizen-subject," and "knowledge" being substantially reworked'. Our study of the three lifelong learning units shows how this re-engineering can take place when examining their unique contribution to knowledge in higher education.

Responsiveness to community needs forms the fundamental foundation for this unique contribution. It begins as a simple response to community needs by providing opportunities to learners outside the academy, initially 'filling the gap' to enable individuals to cope with the rapidly changing job environments in the knowledge economy. It then gradually formalises the knowledge that is originally non-formal or informal in order to gain wider recognition by various stakeholders in the wider community. The formalisation of the knowledge further functions as a bridge between the community and the academy, as the newly produced/organised knowledge has the potential of being gradually immersed into, and accepted by, the parent university as a part of the academy. This is why the parent university is so concerned about the perception of whether a programme from its lifelong learning arm can be regarded as a credible offering by the university. Two of the three cases presented here, the School and the College, evolved out of units which had operated at the margins of their universities primarily offering non-formal academic programmes. Through adopting deliberate strategies, to answer governmental demands in the case of The School and to expand the university's capacity in the case of The College, their academic programmes became formalised and they were able to transform into a dynamic periphery with increasing access to the academic core of

their universities. They have arguably become a feeder to the parent university, bringing in new knowledge paradigms and strengthening links between the community and The Academy. These lifelong learning units, despite tensions with their parent universities, potentially have a role as the university's testing arm in meeting community needs. Referring to Boyer's classification of scholarship as discovery, integration, application and teaching, the lifelong learning units would play some role in at least three of the four aspects (save discovery), and their contribution to knowledge cannot be undermined.

The recent literature in higher education has charted the rise of such notions as 'universities in the marketplace' (Bok 2003), 'the university in ruins' (Readings 1996), 'the enterprise university' (Marginson and Considine 2000) and 'academic capitalism' (Slaughter and Leslie 1997). All these mark the emergence of an environment of decreased funding for higher education, and thus a call for increased entrepreneurial skills in university management. In a landmark study into the future of public universities in the United States, Duderstadt and Womack cited 'mission creep' as one of the great challenges facing the modern university. Moreover, universities are being increasingly pressured to 'demonstrate their commitment to public service' (Duderstadt and Womack 2003, p. 24). Although these seem to be deploring comments about the erosion of the traditional role of the academy, the emergence of the new form and function of the university has indirectly justified and required the contribution of the lifelong learning units. Thus, even though at the periphery the ability of these units to respond to community needs in the changed academic environment means that they now have the potential to contribute to the academic core.

It is thus worthwhile to reiterate Duke's (2001) point in this conclusion that lifelong learning can become a matrix with formal and non-formal education. Likewise, Rogers' (2004, p. 265) remark about the continuum of formal and non-formal education is noteworthy in the sense that lifelong learning and the traditional academy should not be seen in dichotomous terms but as a continuum between them, depending upon the degree of participatory and contextualised learning (in the form of informal education) and decontextualisation (in the form of formal education). While the academy has to become contextualised if it wants to offer public service and be responsive to community needs, lifelong learning, in the process of institutionalisation and formalisation of knowledge, can contribute to knowledge that fits the decontextualisation framework of the academy; however, the interaction of the two will eventually blur the differences between them.

The above discussion sets forth further thinking on the sectorisation and de-sectorisation of education, especially in view of the relationship between lifelong learning units and the academy. Lifelong learning units in the process of asserting their function and role in knowledge building also assert themselves to be seen as an emerging sector of education that warrants formal recognition, perhaps as a 'fourth sector' of education, in addition to the existing primary, secondary and tertiary education. Even though it may be difficult to recognise their formal status as a sector, their active contribution to learning, as argued in this chapter, may at least set forth this sector as a 'quasi-sector'. However, the more the contribution of the lifelong learning sector is felt, the boundary between the academy and the lifelong learning

units will become blurred. And this blurring effect may also lead to a converse blurring effect upon the sectorisation of education, that is, de-sectorisation. Apollon (2001) challenges whether the traditional sectorisation framework is still relevant in post-industrial society, as the term 'sector' connotes the partition of activities into easily recognisable frames of reference. In particular, he views that 'lifelong education and learning' denotes an overall scheme aimed both at restructuring the existing education system and at developing the entire educational potential outside the education system, and this may have impact upon the sectoralised education system. In her keynote speech presented at the 14th World Congress of Comparative Education, Robertson (2010) points out that de-sectorisation is an observable trend of education systems of today: 'Constituted through and legitimated by discourses of lifelong learning and the need to build competitive knowledge-based economies to compete in the global economy, the social contract is being reworked through the collapsing of old borders [sectors]'. Our analysis of the contribution of lifelong learning units witnesses this trend.

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