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Adult Learning: Towards a Framework of Participation

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ABSTRACT

This thesis explores participation in adult learning and focuses upon three key areas of interest: reasons for participation, the challenges of participation, and the enabling factors relating to participation. The purpose of the research is to expand understanding in order to enhance and improve learning support practice, through a study of a university based, professionally accredited, part-time, Master's Degree programme in Human Resource Management, which serves as the research setting.

The study of participation in adult learning is a well-trodden path, beginning with the seminal work of Cyril Houle in the early 1960s. Since then, researchers have continuously sought to prove, disprove or adapt existing typologies. Research has focused on generating groups of single identified factors, motivational indicators and specific challenges influencing participation in adult learning. Specific models and frameworks related to the enablement of participation are identified as being missing from the participation literature, with reference to enablers existing only within the disparate literature relating to adult learning and its broader contexts and influences. A review of the key literature reveals a lack of a single open framework that considers the reasons for, the challenges to, and the enablers of participation across defined contextual dimensions, for the purposes of understanding the nature of participation. This research presents an original conceptual framework matrix, developed from this existing literature, intended to fill this gap. The matrix affords two key opportunities. Firstly, as a theoretical device by which to organise and review current literature in the field and secondly, as a means to identify, explore and present the dominant factors relating to participation in adult learning. To achieve this the matrix identifies the three key areas of interest: i) the reasons participants have for joining the learning activity; ii) the challenges they have faced in doing so, and finally; iii) the elements and influences that enable them to successfully participate in the learning activity. These areas are reviewed further across four dimensions of the participants' life world, that of the psychological, the professional, the practical and the personal.

Utilising a critical realist ontology and a post-positivist epistemology the conceptual framework matrix is used to structure the research design. The

study adopts a linear, mixed methods approach to collecting data using types of thematic analysis (quantitative and qualitative), achieved through the use of an online questionnaire and one-to-one interviews with the target population.

Viewed through the lens of the conceptual framework matrix, findings from within the research setting demonstrate that participants chose to engage with the learning activity as a result of a wide range of influencing factors. Reasons for participation were dominated by two of the dimensions, professional and psychological. Challenges to participation were found to be dominated by psychological factors, alongside issues of a restrictive learning environment and difficulties in achieving work life balance. The dominant enablers were people, deriving from all aspects of the participants' life-world. To aid successful participation in the learning activity under investigation two key recommendations are made to the programme managers and facilitators: i) the facilitation and encouragement of communities of practice and, ii) the development of links between the programme provider and employers.

Further to this, this study suggests that, following further research to establish transferability and usability, the matrix has the potential to contribute to wider practice as an open, exploratory framework to be applied to a variety of different learning activities as a means of identifying areas of improvement or change.

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ABBREVIATIONS

CAQDAS	Computer Aided Qualitative Data Analysis Software
CEDEFOB	European Centre for the Development of Vocational Training
CIPD	Chartered Institute of Personnel and Development
EPS	Education Participation Scale
ESRC	Economic and Social Research Council
FREGC	Faculty Research Ethics and Governance Committee
HR	Human Resources
HRD	Human Resource Development
HRM	Human Resource Management
ISSTAL	Interdisciplinary, Sequential Specificity, Time Allocation and Life Span
IVR	Interview Respondent
LLL	Lifelong Learning
MSc	Master of Science (qualification)
NALS	National Adult Learning Survey
NVIVO	Brand Name – See CAQDAS
OECD	Organisation for Economic Co-operation and Development
ONS	Office for National Statistics
PAE	Participation in Adult Education
QR	Questionnaire Respondent

SCQF	Scottish Credit and Qualifications Framework
SDL	Self-Directed Learning
SM	Survey Monkey
SPSS	Statistical Package for the Social Sciences
UNESCO	United Nations Educational Scientific and Cultural Organisation
WBL	Work Based Learning

1 INTRODUCTION

1.1 Rationale for the Research

This thesis explores participation in adult learning and focuses upon three key areas of interest: reasons for participation, the challenges of participation, and the enabling factors relating to participation. The purpose of the research is to expand understanding in order to enhance and improve participant support practice.

The context for this research is the continuing high demand for formal adult learning provision. A recent survey indicates that whilst levels of participation in informal (self-study) and non-formal (non-credited, class room based) learning have dropped slightly since the beginning of the economic downturn in 2008, there remains evidence to suggest that levels of participation in more formal learning activities (those leading to a qualification) remain stable, and as such is still viewed by adults as an investment in their future (National Adult Learning Survey, 2010). This reflects Giddens' (1999) view of adult learning as being a social imperative; created by a blend of political, economic, technological and cultural factors that influence the act of learning. Giddens suggests that, as a result of the inevitability of change in this modern, globalised society, individuals have become, or have been forced to become, custodians of their own intellectual and professional development. This notion is illustrated through the evolving and popular constructs of lifelong learning, the learning society, learning culture and the learning organisation. They exemplify a notable shift in language from the descriptive use of the term 'adult education' to the more holistic remit of 'adult learning', which represents the wider range of developmental interventions and opportunities that adults now participate in as investment in their on-going personal and professional development (Rubenson, 2010a).

The proposed context of change suggests that, whilst there remains strong demand for formal learning provision, the challenges facing those choosing to participate are also likely to change and be influenced by their own prevailing context. This presents a challenge for learning and education providers in that

assumptions cannot be made as to the extent to which their provision and practice meets the needs of the contemporary learner. Consideration must be given to the extent to which current practice enables participation in terms of access, the offering, and the necessary support mechanisms that consider the changing needs, motivation, and context of the learner (Wilson and Cervero, 2010; McQaid et al. 2010). This highlights a need for learning and education providers and facilitators to gain an accurate and up-to-date insight in to the nature of participation in adult learning and the prevailing context driving the act of participation, particularly from the perspective of the learners themselves.

The large body of literature relating to participation in adult learning is dominated by lists and typologies which serve to pigeon-hole learners in terms of their reasons for participation and the barriers to that participation, with little consideration of the prevailing context of the individual. Enabling factors and influences are not explicitly considered and defined by the participation literature, yet the vast field of adult learning regularly signposts enabling features and mechanisms and their influence on the act of participation. Following this review of the related literature there appears to be a gap in terms of a theoretical approach that encompasses all of these **three key areas**. There is a lack of a single open framework that considers the nature of participation in adult learning, and specifically the **reasons** for, the **challenges** to, and the **enablers** of participation across defined contextual dimensions. The central purpose of this thesis is to fill this gap by developing and trialling a framework that affords the opportunity to identify and explore the dominant factors relating to participation in adult learning.

1.2 Research Issue

Following a consideration of the context and purpose of this study, the investigation is driven by the following research aim and objectives:

The overall aim of this research is to investigate reasons for participation in adult learning, the challenges to participation, and the enabling factors related to participation in order to enhance the quality of participant support practice.

The research setting is a university based professionally accredited Master's Degree programme in Human Resource Management, which requires part-time attendance. The programme is hereafter referred to as 'the learning activity'.

In order to achieve the aim of the study the objectives of this research are:

1. **to develop a conceptual framework through a critical review of the key literature in the field of adult learning and that of participation in adult learning.**

2. **to investigate participants' perceptions of their reasons for participation in adult learning, the challenges they faced before and during participation and the enabling factors related to their participation.**

3. **to trial the effectiveness of the conceptual framework of participation in adult learning as a tool to enable academics and institutions to enhance and improve participant support practice**

4. **to present recommendations for improved practice within the research setting, and opportunities for the wider application of the framework**

In order to achieve these objectives, this study uses a review of existing theory and research in order to identify key factors influencing participation in adult learning. From the literature, a conceptual model, in the form of a conceptual framework matrix, has been developed to investigate the **three key areas** of interest relating to participation in learning activities, these being reasons, challenges and enablers. Each area is explored across **four identified dimensions -** psychological, professional, practical and personal; the model is tested providing a basis for the fieldwork phase of this research. The empirical research questioned the relevance and context of these issues in relation to the experiences and perceptions of participants identified within the research setting. Analysis of the empirical data gathered from an online questionnaire and subsequent semi-structured interviews allows emergent research findings to be compared with existing theory in the field of participation in adult learning.

The research identifies context specific factors perceived as influencing participation in adult learning among the target population, which has not been previously recognised or acknowledged. Combining the range of emergent research findings allows this thesis to present a conceptual framework matrix of the reasons, challenges and enablers relating to participation in the chosen adult learning activity.

The argument developed within this study is that the notion of adult learning with its many and varied objectives, sources and outcomes does not exist in a vacuum, and the desire and need to learn is inherently influenced by the context within which the individual learner exists. This work proposes that the act of participation in learning (including the reasons for participation, the challenges faced before and during participation and the principal enabling factors) is influenced by the participants own lifewide context across four key dimensions – psychological, professional, practical and personal. The findings suggest that it is a unique combination of these factors and dimensions that create the context of learning for each participant.

A competitive educational marketplace prevails, and this suggests that an understanding of participation in adult learning is integral to ensuring that participant support practice is designed to ensure on-going and successful participation in such activities. This study acknowledges that specific empirical findings related to the research setting under investigation are not necessarily generalisable across other learning activities. Consideration is given, however, as to how the conceptual framework matrix could be applied to assist those designing and delivering other such activities, and to its potential as a guiding framework for further research.

By identifying the key issues of participation through the framework, this study presents recommendations for improved practice in the area of participant support. Specific outcomes and recommendations are identified in the final chapter of this thesis.

1.3 Thesis Structure

This thesis consists of six further chapters and is supported by a number of appendices and a full reference list.

Chapter two presents a review of the wide range of existing theory and relevant literature related to the topic, introducing the concepts of adult learning and participation. The principal output of the literature review is the development of a conceptual framework matrix, combining the key factors and dimensions related to the context of participation around which the subsequent primary data collection and analysis is structured.

Chapter three (methodology) outlines the research approach adopted and provides a justification as to the approach taken during this research. A review of alternative research paradigms is presented and the use of a mixed methods approach, using a questionnaire followed by semi-structured interviews, is discussed. A justification for the data collection methods used is provided. Chapter three also outlines the procedures that were developed for the conduct of the data-gathering and analysis techniques, as well as addressing issues relating to the sample population, research validity and reliability, and ethical considerations.

Chapters four, five and six present the findings from the primary research and provide a detailed discussion of these findings in the context of the literature review, and are structured around the four key dimensions identified in the conceptual framework matrix. Chapter four considers reasons for participation, chapter five considers the challenges to participation, and the final discussion chapter, chapter six, considers the enablers of participation. Finally, chapter seven draws together the key findings of the study and presents them in a complete framework matrix. The relevance and applicability of the three factor, four dimensional conceptual framework matrix is discussed in light of the findings and research process. Recommendations for improved practice within the research setting are presented, and consideration is given to the possibilities of wider usage of the framework matrix, and its potential contribution to both practice and current literature. Finally, reflections on the

study are provided, and suggestions for additional academic research are proposed.

2 LITERATURE REVIEW

‘Learning is no longer a choice but a necessity’ (Schein, 1993)

2.1 Introduction

The purpose of this literature review is to identify and engage with previously published research relevant to participation in adult learning, in order to fully understand the topic and identify issues which may require further investigation (Ticehurst and Veal, 2000). In order to develop this understanding, this chapter explores the key characteristics and contexts of adult learning, and investigates the nature of participation in learning itself, including the apparent challenges experienced by learners before and during participation.

This chapter contains two key sections designed to provide both a broad contextual overview of the subject area and a detailed critical analysis of the key debates and theory relating to this study’s objectives. Firstly, an exploration of the meanings, constructs and development of adult learning is presented with specific focus on types of learning and the nature of learning itself. The purpose of this is to gain critical perspectives on the act of learning itself – how, when and why it occurs – and the social, cultural and professional contexts within which it occurs. This study adopts the view that an exploration of learning theory is critical to understanding the key enabling factors that influence the decision to participate, and the act of participation itself, and provides a theoretical foundation for the subsequent discussion of participation in adult learning. Further to this, a consideration of contextual factors provides a foundation on which to discuss the act of participation in learning activities by revealing the contextual influences on participation in learning, and provides a precursor to an understanding of an individual’s motivation, capacity and capability to engage in self-development, and how this is enabled.

Following this, a detailed analysis of the seminal adult participation research is presented in the second principal section of this chapter. This section considers psychological and socio-cultural models relating to reasons and orientations for participation in adult learning. This is followed by a discussion of the challenges individuals face when choosing to participate in such activities. In this case, the

definition of participation offered by Tight (1998) is used, in that participation is considered as ‘taking part in some definite, observable activity… in such cases, participation can be readily checked: the presence of individuals may be observed and there is frequently some end product in the form of an attendance certificate or qualification’ (p 142). From this perspective the individual is either a participant or is not, and the focus of this research is to explore the journey to active participation in the aforementioned ‘learning activity’.

It is acknowledged that the focus of this study has the potential to include a wide and varied range of topics, disciplines and contexts, and boundaries had to be created to support a manageable remit and targeted research objectives. Topics related to learning itself, including learning styles (Honey and Mumford, 1989; Mumford, 1995; Sadler-Smith, 1997), types of learning opportunities and interventions (Harrison, 2009) have been considered. In addition, explicit work related themes such as organisational development, human resource development (HRD) (Gold et al. 2013; Gibb, 2011; McGoldrick et al. 2001), training (Harrison, 2009; Hackett, 2003) and work-based learning (WBL) (Raelin, 2008; Garnett et al. 2009) were reviewed and considered in light of the chosen research setting. These areas were all excluded from the final review on the grounds that, whilst related, they were peripheral to the study of the *individual as learner* in the context of the research objectives outlined in chapter one.

2.2 Key Definitions

The terms adult learning and adult education are often used interchangeably, and for the avoidance of doubt it is pertinent to be explicit about the definitions that are critical to this study, and why adult learning is of central interest. This study views these concepts as complementary strategies, in that learning is an intended outcome of education. Jarvis et al. (2003) define adult learning as ‘a combination of processes whereby whole persons transform episodic experiences into cognitive, physical and affective outcomes and integrate them in to their biography’ (p104). Jarvis develops this definition by outlining the existential nature of learning as an activity that continues life long and life wide and which is never complete.

Education is defined by The United Nations Educational Scientific and Cultural Organisation (UNESCO) as 'organised and sustained instruction designed to communicate a combination of knowledge, skills and understanding valuable for all the activities of life' (Tight, 2002 p17). Darkenwald and Merriam (1982) propose that 'adult education is a process whereby persons whose major social roles are characteristic of adult status undertake systematic and sustained learning activities for the purpose of bringing about changes in knowledge, attitudes, values and skills' (p 9). From a simpler perspective, Merriam and Brockett (1997) refer to education as intentional activities designed to bring about learning, thus emphasising the inextricable relationship between the notions.

The population at the centre of this study are individuals participating in an 'organised learning activity' which is a professionally accredited postgraduate programme. The standalone notion of education implies a visible, tangible activity, which the learning activity in question is; however, this narrow perspective implicitly restricts the view of participation in such an activity to that of enrolment, attendance and certification. To meet the objectives of this study it is pertinent to view participation in such an activity from a 'learning lens'. This enables the exploration of the complete journey towards participation, lifelong, lifewide and context driven, rather than simply the act of participation itself.

Courtney (1992) suggests the notion of learning represents a sense of freedom to choose, to be a consumer of educational products, and to have ownership over the decision to participate, or not. Courtney further suggests that using the term 'learning', rather than 'education', allows us to explore how learning is embedded in our day to day lives, and therefore how we allocate meaning and value to it as individuals, rather than simply as an explicit, independent activity. It is a means of viewing participation in an 'organised learning activity' from a wider range of angles, such as personal, psychological, practical and professional perspectives, rather than from simply an outcome driven perspective.

2.3 The Nature of Adult Learning

To understand the reasons, challenges and enabling factors related to participation, this first principal section considers the nature and context of learning in order to understand the act of participation itself. This section considers the theoretical concepts which underpin adult learning, thus developing the foundations towards a theory and model of participation in the form of a conceptual framework matrix that has been used to frame the subsequent primary data collection and analysis.

This section therefore contains three key points. Firstly, a range of types of adult learning is discussed and explores types of adult learning experiences, including the notions of planned, emergent, tacit and explicit learning. The discussion then evaluates and compares the principal theoretical paradigms of the nature of adult learning, including behaviourism, cognitivism, experiential learning and humanism, and provides a critical evaluation of the related hybrid theories of andragogy, self-directed learning and transformational learning. Finally, a discussion of the social, cultural and organisational positioning of adult learning is presented, analysing the concepts of lifelong learning, the learning society, the learning organisation and learning cultures.

2.3.1 Types of Adult Learning

Learning itself can be experienced by an individual in many forms and can initially be placed within the broad categories of formal, non-formal and informal learning (European Commission, 2000 in Rubenson, 2010a). The episodic experiences of learning can be planned or can occur in an ad-hoc, emergent manner. Planned or deliberate learning can manifest itself as formal structured training or educational events that have clear objectives and outcomes; this type of learning generally occurs in an educational or training institution and often leads to some form of certification. In this case systematic training models are often utilised and/or core objectives are formulated to fill a skills gap or to meet a personal or organisational target. Deliberate learning also takes place in non-formal situations such as in the workplace, community groups, clubs etc… or within activities designed to complement formal learning, such as extra-curricular activities. These activities may include formal objectives and support

mechanisms but will not lead to formal recognition of the learning (Jarvis et al., 2003; Rubenson, 2010a).

There is a body of work that focuses attention on the importance of informal or emergent learning and the importance of the development of tacit knowledge. This type of learning is the result of everyday life experiences which are occasionally sought after, but are often incidental. Nonaka and Takeuchi (1995) propose that tacit knowledge concerns the unarticulated mental models and skills possessed by the individual. Such knowledge is often context specific and personal, and is derived from ad-hoc experiences and recurrent or routine practices. Giddens (1979; 1986) discussed this type of learning in terms of ‘practical consciousness’ – an individual may simply know and understand new skills and knowledge with little or no awareness of their source. It is often difficult to actualise this knowledge gained discursively and pass the knowledge on – it is simply known. Such tacit knowledge may not have an identifiable source and is generally not the direct result of a targeted learning objective but can be equally as powerful in an individual’s ability to perform and ultimately develop.

This brief discussion provides an initial platform for an analysis of the nature of learning itself as it begins to reveal the complex range of adult learning experiences that may serve to influence on-going attitudes toward engagement with, and participation in, learning activities.

2.3.2 Theoretical Perspectives on Adult Learning

An understanding of how adults learn provides the foundations for developing and achieving the key desired outcomes of this research. An exploration of the key theories, including behaviourism, cognitive theory, experiential learning and humanism, provide an insight in to the act of gaining knowledge and expertise through learning. It is this insight in to the act and purpose of learning that informs the objectives of this study, suggesting that the nature and experience of learning influences reasons for participation, creates and overcomes the challenges faced by participants and enables active participation.

Historically, theoretical perspectives on adult learning appear to have been rooted within the behaviourist school – a paradigm which can be traced back to the collective works of academics and philosophers such as Aristotle, the 'trial and error' theory of Thorndike (1913; 1928), the classical conditioning notions of Pavlov (1927), the operant conditioning theory of Skinner (1974) and the stimulus-response theory of Gagne (1977). The principal methodology of these studies was one of testing and empiricism – a positivist view of the adult learner. The broad concept of behaviourism proposes that learning is a change in observable behaviour caused by external stimuli in the participants' environment (Skinner, 1974). This fundamentally places emphasis upon the notion that changes in actual human behaviour are the primary indicator of learning, and that cognitive change and processes cannot necessarily be measured and therefore cannot be indicators of learning. Good and Brophy (1990) simplify this further highlighting that behaviourism chiefly involves the study of overt behaviours that can be observed, identified and quantified. It is this positivist viewpoint, and seemingly restrictive approach to the understanding of adult learning that has guided much of the modern literature on adult learning and education towards the more critical concepts within the broader cognitive learning theories and humanistic psychology.

Cognitive psychology provides an alternative to behaviourism which, by its very nature, requires the exclusion of new cognitive knowledge unless it results in behavioural change. This approach, developed most notably by Piaget (1928), places emphasis upon memory, motivation, thinking and reflection as key elements of the learning process, a process dependant on a number of internal and external variables. Cognitivism views learning as an internal process with the extent and depth of learning associated directly with the individuals' capacity and/or ability to process new experiences and information, the level of effort expended during the learning phenomenon, the depth of processing, and where the new learning is placed within an existing knowledge structure. This paradigm suggests that learning should be a self-owned and managed journey, with the outcome being dependant on those enabling and restricting variables that influence the act of learning (Jarvis, 2010; Huczynski and Buchanan, 2010). This paradigm, which considers both the individual and the influence of the

context within which individuals find themselves, serves to influence the key objectives of this study in terms of the reasons, challenges and enablers related to the act of participation in learning.

Emerging from cognitive theory is a more specific focus upon context and its influence upon the learning process. Merriam (2010) argues that learning cannot be understood as simply an individual, internal cognitive process, and suggests that it is the result of the interaction of people in a particular situation or environment using particular tools or artefacts, such as technology, language, signs, and symbols. The situated learning theory (SLT) of Lave (1988) and Lave and Wenger (1991) highlight the role of the group in adult learning. The paradigm focuses upon the context within which the learning takes place and within authentic learning activities (for example, those that occur within a work-place setting), with a particular emphasis on the social factors and interaction with others during the learning experience. This approach describes the act of learning in two ways, that of legitimate peripheral participation (newcomers to the activity or learning opportunity) and communities of practice (full on-going participants) (Fuller and Unwin, 2004; Fenwick, 2010). It is the relationships that form which generate 'communities of practice'. These communities are groups of people within formal learning environments and social and community structures, or within organisational settings that share experiences, thoughts, ideas and arguments in order to find solutions to problems, quality improvement methods, a shared vision and mutual values. This can subsequently become routine practice or a common world view (Merriam, 2010). This continued emphasis upon the influence of context provides further conceptual support for a need to look beyond simply why adults learn, and to further explore contextual enablers to that learning.

This social view of learning in a specific context is explored within the concept of the expansive – restrictive continuum presented by Fuller and Unwin (2004). The continuum is intended to illustrate the key features of different learning environments, that of the organisational, the pedagogical and the cultural contexts, and the ways in which people participate in learning. Fuller and Unwin propose that the principal purpose of this conceptual framework is to

‘identify features of the environment or work situation which influence the extent to which the workplace as a whole creates opportunities for or barriers to, learning’ (p131). The identified features are then considered in terms of their expansive or restrictive characteristics, and provide a lens through which to view the available mix of learning opportunities and enabling mechanisms, and serve to underpin the focus of this study. Fuller and Unwin’s framework seeks to expand that of Lave and Wenger (1991) to include formal education and ‘off the job’ learning, suggesting that these contribute to expansive approaches that lead to an extension of a community of practice, an opportunity for reflection on current practice, and a means to gain relevant qualifications that aid organisational and social objectives, career progression and personal development.

Cognitive psychology acknowledges elements of behaviourism, including that of situated learning, communities of practice and the role of the learning environment in the learning process, stressing the relevance of repetition and reinforcement during any learning event. Despite this acknowledgment, cognitivists stress that learning primarily involves the acquisition and reorganisation of cognitive structures which allow humans to process and store information (Good and Brophy, 1990). Social Learning Theory or Social Cognitive Theory has often been described as the bridge between cognitivism and behaviourism as it relates the triadic, reciprocal phenomena of causation which, in simple terms, involves personal factors (cognitive, affective, and biological events), environment and behaviour. Bandura (1977; 1986) suggests that, in the absence of rewards or punishments, we learn new behaviours through observing and imitating the actions and behaviours of others. In this approach the ability to reflect and plan are key, but the theory does not renounce the importance of reinforcement, a key element of Behaviourism (Huczynski and Buchanan, 2010). Bandura’s theory proposes that ‘we construct, through observation and experience, internal models of our environment and plan courses of action accordingly’ (Huczynski and Buchanan, 2010, p151). From here, individual values, expectations and goals form, influencing future learning and decision making, and concurrently influence behaviour. This paradigm suggests the need to acknowledge past experience

as both an enabling force and a restrictive factor in the decision to participate in learning, and provides a link between the individual and their context in the act of learning itself.

The work of Kolb (1984) sought to build upon the ideas of Piaget (1928) and the cognitive psychologists and has developed into one of the most influential theories of adult learning, underpinning much of contemporary learning and development practice (Tight, 2002). Kolb's work sits lightly between the behaviourist and cognitive schools, and can be more comfortably placed within the realm of experiential learning theory and constructivism – a theoretical half way house. Kolb defines learning as 'the process whereby knowledge is created through transformation of experience' (p.38). Kolb presents learning as the developing relationship and understanding between content and experience, a personal construction of meaning through experience (Armstrong, 2012). Harrison (2009) acknowledges the influence of experiential learning theory upon educational practice, but highlights an overemphasis on the individual with little consideration of the wider organisational, social and institutional contexts.

The work of Kolb (1984) was greatly influenced by cognitive psychology in terms of its focus upon active reflection, and it is apparent that elements of the model, principally a focus on the individual and their subjective experience of learning, have been influenced by humanistic psychology. This set of theories was developed during the 1950s and 1960s in reaction to a growing trend towards the psychoanalysis techniques of Freud and the Behaviourist School, and focused once again on the individual. The uniqueness and subjectivity inherent in human beings was considered, and authors such as Maslow (1943) and Rogers (1969) discussed adult learning and development in terms of actualisation and self-fulfilment achieved through an understanding and appreciation of subjective experience and personal values. In practice, empowerment became the cornerstone of this theory, with psychologists aiming to promote and encourage self-understanding, allowing individuals to discover solutions to problems or issues on their own terms (Schneider et al., 2001). These paradigms serve as a reminder that learning is a phenomenon unique to an individual participant, and that the experience of learning must not be

generalised. The learning journey of the individual is therefore central to this study.

The humanist view of learning has influenced three levels of theory which have since become foundational in the field of adult learning – andragogy, self-directed learning and transformational learning. The concept of andragogy, as a means of integrating the previously multi-disciplinary context of adult learning, was initially developed in the mid twentieth century through the work of Overstreet (1949, cited in Knowles et al., 2011). Subsequent attempts at structuring such a broad range of isolated theories did provide an overview of influential concepts, but failed to explore and present adult learning as an integrated theoretical framework in its own right (Knowles, 1950; Bruner, 1959; Kidd, 1973; Gibb, 1960; Miller 1964; all cited in Knowles et al., 2011). The term andragogy was introduced by Savicevic in 1967, and was quickly adopted by Knowles (1968) in his work 'Andragogy, Not Pedagogy' the following year.

The concept of andragogy, as defined by Knowles (1968), makes clear distinctions between the focus of pedagogy and the teaching of children, and the adult learning focus of andragogy. He outlined a number of key assumptions that draw a line between child and adult learning (Jarvis, 2010; Tight, 2002; Knowles et al., 2011). The andragogical paradigm distinguishes adult learners as being 'self-directed' and capable of making independent decisions to engage in the act of learning. It is during this act that they draw upon a growing bank of experience and prior knowledge that supports learning and development. Furthermore, adults demonstrate levels of readiness and willingness to engage in learning that helps them confront their personal and professional problems, to 'cope effectively with their real-life situations' (Knowles, 2011, p67). Adults therefore engage more commonly in problem-centred, rather than subject centred learning. Knowles et al. (1984 in Jarvis, 2010) later expanded his original assumptions to include a discussion of 'the need to know'; an adults' need to understand why they need to learn something prior to engaging in the act of learning itself. It is the constant evolution of the paradigm that has exposed it to much discussion and criticism (Jarvis, 2010). Brookfield (1986, cited in Tight, 2002) and Tennant (2005) suggested that Knowles' notion of

‘readiness to learn’ obfuscates the reflective and reflexive aspects of engagement in learning and leads to a reductionist and behaviouristic approach to the activity. Another principal criticism of Knowles work is that of the lack of clarity and detail within his assumptions, and little psychological analysis and evidence to support his claims (Davenport, 1987). Day and Basket (1982, cited in Jarvis, 2004) propose that Knowles work is ‘not a theory of adult learning, but is an educational ideology rooted in an enquiry based learning and teaching paradigm – and should be recognised as such’ (p 150).

As if to draw closure to the seemingly endless debate and the danger of generating further terminology and disparate theory, Knudson (1979) suggested the term ‘humanagogy’. He intended it to be a theory of learning that considered and valued the differences of people at varying stages of their life, ‘a theory of learning that combines pedagogy, andragogy and gerogogy (learning in older adults), and takes into account every aspect of presently accepted psychological theory’ (p261). Knudson’s generic term has gained little credence in the adult learning literature and is viewed simply as a new label for a well explored paradigm. Jarvis (2010) affords Knudson’s term some credit in its emphasis on the human element of the debate that at the root of all learning is a living, breathing participant, a view that is central to this study.

Research conducted by Tough (1971, cited in Tight, 2002) also sought to separate child and adult learning and provided the starting point for the model of self-directed learning (SDL). Merriam (2010) outlines the theory of SDL as one of ‘learning that is widespread, that occurs as a part of adults’ everyday life, and that is systematic yet does not depend on an instructor or classroom’ (p30). Early models of the SDL journey experienced by an individual were presented by Tough (1971, cited in Tight, 2002) and Knowles (1975) and view SDL as a continuum of identifying a learning need, to locating resources and delivery methods, to evaluating outcomes of learning. These linear models were later developed by Spear and Mocker (1984) and Danis (1992) to include the context and nature of the learning itself, thus providing a more holistic view of the learning experience. Spear and Mocker (1984) outline the relevance of learning opportunities, existing and new knowledge and ad-hoc, unplanned learning.

These ‘organising circumstances’ structure the SDL activity and generate further circumstances for subsequent learning activities (Merriam, 2010). Such models consider the ‘life world’ of the learner, and further emphasise the value of exploring the learners’ context as a possible source of enabling mechanisms, as well as a source of challenges and barriers.

The theory of transformational learning further builds upon the foundational views that define the differences between child and adult learning, but positions itself within a socio-cultural dimension rather than that of psychology. In this paradigm, emphasis is awarded to the ability of adults to find and create meaning, meaning that is dependent upon the occurrence of significant adult life experiences and, according to Merriam (2010), ‘a more mature level of cognitive functioning than found in childhood’ (p 31). The work of Freire (1970; 1993) provided the basis for theory development in this area. His work opposed the idea of ‘banking’, simply, that of viewing the minds of individuals as a vessel to fill with knowledge and information. He believed that education was in fact an opportunity to provide open streams of dialogue, space and support to identify and cement ideas within the individuals’ social, political and economic context. Freire’s notion of ‘Conscientization’ sought to highlight the process of reflection as a catalyst for learning and a means by which new realities (knowledge) become apparent to the learner, and therefore empowering a learning self-identity whereby participants view themselves as active learners (Kolb and Kolb, 2009). Freire believed education was ‘the practice of freedom’ and that this type of learning could influence social change (Jarvis, 2010; Merriam, 2010; Tight, 2002).

The work of Freire (1970) had a profound influence on the work of Mezirow (1977; 1981; 1985; 1990; 1991) in that he believed education has the power to change and empower. Mezirow focused on the transformation of the individual through education, through addressing and questioning constructed realities by means of reflection on experience, and generating new approaches to situations and events as a result. The key principle here is that learning can alter beliefs, attitudes and value systems, and has the potential to alter individuals’ perspectives, thus transforming them. Mezirow’s theory also draws

from the idea of 'life transitions' or anomalies that influence or generate a learning need. From this perspective, Jarvis (2010) suggests the learner must consider alternative ways of finding meaning and perspective, and it is from this point that a learning cycle begins.

It appears that many of these core theories of learning overlap in terms of the developing key principles of how adults learn, and in simple terms can be reduced to a three-stage taxonomy of learning – the what, why, and how - as presented by Ertmer and Newby (1993). The behaviourist approach appears simplistic in its view, applying principally to situations that require a learner to acquire and assimilate facts, and focusing only upon discovering *what* the key changes and outcomes will be following a learning event. Cognitive paradigms can guide the learner to the 'how' in a given situation by highlighting process and principles, acknowledges the value of the learner challenging their current norms, and promotes learning as a self-owned and managed journey influenced by a range of enabling and restrictive variables. Building upon this, humanist paradigms emphasise the importance of asking *why,* and requiring an individual to calibrate new information against a specific context and/or personal values and meaning, whilst also acknowledging the influence of expansive and restrictive mechanisms. Central to this study are the key pillars of the learning experience presented in these latter models, that of the individual learner and the influence, enabling or otherwise, of their context.

2.3.3 The Context of Adult Learning

In order to complete this picture of adult learning it is important to explore the socio-cultural and organisational influences surrounding the phenomenon of learning alluded to in the key learning theory. This serves to develop an understanding of the 'life world' of participants, and to develop a clear line of sight between the nature of learning and the supporting constructs and structures required to enable participation. This section explores the concepts of lifelong learning, the learning society, the learning organisation and learning cultures, in order to understand developments in thinking, policy development and the transfer of ideas within the field of adult learning, which have the potential to influence decisions to actively participate.

The origins of lifelong learning as a distinct concept can be dated back to the 1960s, when the Council of Europe, UNESCO and OECD concurrently labelled education and learning as beyond that of the socially constructed physical and age restricted boundaries of primary, secondary and tertiary education. Each of the bodies defined lifelong learning as recurrent or adult learning, with the central idea being the same, in that it is the development of coherent strategies to provide education and training opportunities for individuals throughout their life time (Jallade and Mora, 2001). Governments viewed lifelong learning as an umbrella policy framework that influenced not only globalisation and competitiveness, but also social inclusion and cultural change (Field, 2010).

Interest in the concept re-emerged during the mid-1990s as a reaction to post-industrialism and the belief that economic competitive advantage can be found in knowledge, skills and creativity. It could be argued that the shift in focus from adult education to lifelong learning highlights the value of output over a pre-occupation with input (Rubenson, 2010a). In 1996 the White Paper, *Teaching and Learning: Towards the Learning Society* demonstrated a growing acknowledgment, if not understanding, of the value of continuous learning and development and its relationship with the economy. The paper stated that successful evolution towards a knowledge economy and society required governmental, corporate, societal and individual investment in continuous learning and skill building. A view closely aligned with human capital discourse and its approach to social inclusion and economic growth (Borg and Mayo, 2005; Field, 2010).

Jarvis (2010) present a normative and holistic view stating that 'lifelong learning embraces the socially institutionalised learning that occurs in the educational system, that which occurs beyond it, and that individual learning throughout the lifespan, which is publicly recognised and accredited' (p65). It appears that the tipping point for the success of the concept is an individual's willingness, capability and capacity to engage in self-development, a view that appears in line with the cognitivist view of learning as an owned and managed journey (Tight, 2002). In contrast, Coffield (1999) argues that lifelong learning can be manipulated to suit a wide variety of agendas: from promoting or preventing

organisational change, as a means of up-skilling and creating knowledge workers in a competitive business environment or simply for personal and/or professional development. He also argues that it can be presented as social policy – to promote social inclusion and to encourage individuals and communities to actively participate in social, cultural and political affairs. Field (2010) supports this broad framework of application, arguing that lifelong learning recognises the multiplicity of ways individuals build their skills at all stages of adult life, within a wide range of contexts, therefore becoming lifelong and life wide.

Coffield (1999) presents a warning amidst the apparent 'solutions' the concept presents stating that we must be aware of the social control exerted by a labelled concept, arguing that we should be wary of a packaged idea of learning and development that should be guided and constructed by the individual and not built and dictated by a third party. The nature of the lifelong learning paradigm is clearly contested and critical views of lifelong learning are held by many. Bagnall (1990; 2000) notes its lack of precision in terms of differentiating between forms or levels and the lack of distinction between the varying formal educational interventions. Tight (2002) also introduces the practical implications such as access, cost, time and resource implications, which are often missing from the normative literature.

Lifelong learning often appears to hide amidst the safety of formal institutionalised and accredited learning, leading to much debate on the subject. It appears that policies apply to groups within society, or society as a whole and do not account for specific environmental and cultural variables experienced by each individual member of 'society'. Thus, the branding of the concept, the constructed meaning and its apparent hijacking by policy makers, may serve to undermine the learning processes themselves, shifting the focus away from adult learning as a means for development, and obfuscating the value that an individual will place on their new knowledge or experience (Torres, 2003 cited in Field 2010; Jarvis, 2010).

Lifelong learning, now a recognisable label for adult learning, was born of 'The Learning Society', a global paradigm which can trace its roots to a post-war

clamour for social inclusion and wider access to education. The Learning Society reaches beyond the relative and contested definitions of lifelong learning and recurrent education to include an awareness of the technological and communication innovations of the late 20th century. Hayes et al. (1995) push these boundaries further, to suggest that modern notions of active citizenship are reconnecting with the Learning Society, and generating interest in the concept once again.

A wide range of prescribed and idealist views of the Learning Society are presented by the literature and by public bodies whose interests lie in regeneration, inclusion and development. Definitions include visions of an ‘educated society’, a ‘learning market’ or a ‘learning network’ (Edwards, 1995), with others focusing on equipping individuals with the skills to perform roles that have a positive impact on economic prosperity and the community as a whole (Coffield, 2000). Cara et al. (1998) reject the limitations of education and training and suggest that it is a ‘place or society where the idea of learning infuses every tissue of its being’ (p1-2, in Tight, 2002). Jarvis (2010) proposes that these varying agendas may miss the point entirely and fail to acknowledge that society is now being forced to learn in an unplanned and uncontrolled way, within environments not previously associated with learning, and with varying perceptions and interpretations of what learning is. Ultimately, engagement in lifelong learning and contributions to the learning society are increasingly viewed as pre-requisites for participation in the knowledge society, where individuals, communities and organisations play their part in social and economic wellbeing.

Organisations hold significant influence over the nature of lifelong learning and the prevailing learning society, and in difficult economic times organisations are increasingly viewing learning as a means of engaging with their employees as a route to competitive advantage (Rohrbach, 2007). This power to potentially support and enable participation in adult learning is significant, and has been the source of considerable discussion during the post-industrial era as to how this is managed, with a particular focus on the notion of ‘the learning organisation’.

The Learning Organisation is both problematic and perplexing in terms of its construct, the key literature lacks consistency and there is little empirical evidence to support its value. According to Garavan (1997), approaches to the concept fall within two distinct categories: a metaphor symbolising a normative or aspirational culture - an approach which presents hurdles when attempting to link knowledge and practice, or it is a more tangible variable which has the power to exert influence over strategy, operations and, ultimately, output. Pedler et al. (1991) described a learning company as an organisation that facilitates and enables the learning of all its members; an organisation that consciously and intentionally transforms itself and its context, providing a clear line of sight between learning, knowledge and strategic change. They identified eleven characteristics of a 'Learning Company' (Appendix 9.1). These characteristics, whilst being prescriptive, describe a flexible organisation with clear strategic objectives and a learning culture.

The learning culture that exists within an organisational environment is acknowledged as a key influencing factor in the creation of a learning organisation, and allows the discussion to focus upon the impact of participation in learning on the individual, and not just on the organisation as a whole (Burgoyne, 1995). Reynolds (2004) awards credence to a learning culture beyond that of simply an attribute or identifiable manifestation, and discusses it in terms of a 'growth medium' – an environment which enables stakeholders to commit to positive discretionary behaviours, such as a willingness to participate in learning and development for the long term success of themselves and the organisation.

The notion of learning cultures has not escaped the sort of restrictive trappings of criteria and theoretically founded definitions placed upon the learning organisation. Schein (1992) attempted to define the key characteristics of a high level learning culture. Schein's work can be viewed as normative due to the lack of empirical underpinning to support, it but is an often cited model in discussions of learning cultures. He proposes ten key characteristics which represent a series of basic assumptions that facilitate organisational learning. These range from 'Human Activity', whereby employees are proactively involved in decision

making, to ‘Goodness’ and ‘Mutability’, that assume that workers want to be involved in the decision making process and are flexible and open to change. O’Keeffe (2002) develops this notion further, suggesting that organisations demonstrating a learning culture are inherently entrepreneurial, and organisations that place value upon knowledge and learning are more likely to generate innovation and creativity (Hamel and Prahalad, 1991 cited in O’Keefe, 2002). It seems that conclusions can be made here as to the simple value of a positive attitude towards learning, negating the need for complex models and prescriptive societal ideals, suggesting that at its core, a positive learning culture is the means by which an organisation can support and enable an individual’s ‘owned journey’ through participation in learning activities.

2.3.4 Section Summary

A critical analysis of the types of learning experienced by adults, of the key learning theory, and of the social, cultural and organisational contexts of learning has revealed a variety of factors that serve to underpin and pre-empt the following discussion of participation in learning.

The discussion has revealed that adults are exposed to a complex range of learning experiences over the course of their lifetime, impacting across many aspects of their own biography, thus rendering learning, in a variety of guises, lifelong and life wide. Such experiences are often context specific, can be both planned as well as ad-hoc, and can be recurrent or stand alone. Learning experiences gathered over the course of a lifetime, alongside the individuals’ prevailing life context, serve to influence an individual’s attitudes to, and engagement with, the act of learning itself. It is these experiences and contexts that can enable or restrict the ability to articulate a desire or need to learn, or the perceived ability to learn. This, in turn, influences their willingness and readiness to participate in such activities. The experience and context of learning has the potential to have a significant influence over the reasons for participation, the potential challenges that may be faced, and the enabling factors towards active participation, and are therefore worthy of further investigation.

Following this discussion, initial conclusions can therefore be formed regarding an individual's experience of learning, and their ultimate participation and engagement with learning, in that it is often an owned and personal journey, driven by experience and context. The key paradigms of learning itself exist on a continuum of overlapping viewpoints, from the behaviourists (Skinner, 1974; Thorndike, 1913; 1928; Pavlov, 1927; Gagne, 1977), who build from the view that learning is simply an observable change in behaviour, through to the Humanists (Maslow, 1943; Rogers, 1969; Schneider et al., 2001) who view learning as a route to self-actualisation and empowerment.

As the continuum progresses with approaches such as self-directed learning (Tough, 1971; Knowles, 1975; Spear and Mocker, 1984; Danis, 1992), and transformational learning (Freire, 1970; Mezirow, 1977; 1981; 1985; 1990), it becomes more apparent that the context of the individual impacts on the outcome of learning and on the act of participation in learning activities. This suggests that it is the participants' life context and subjective experience which has the potential to drive and influence the meaning of learning and its possible outcomes. From this review of the literature, it appears crucial to acknowledge that active participation in adult learning is both restricted and enabled by the organisations individuals work for, the communities, society and structures they function within, and the state of the prevailing learning culture, as well as by the individual themselves. This holistic view of the learning experience is central to the objectives of this study and guides the methodological and conceptual approach adopted.

2.4 Participation in Adult Learning

The focus of this review now narrows and explores the reasons for participation in adult learning activities and the challenges faced by individuals when choosing to participate. The following sections critically evaluate the seminal literature and key paradigms in the area of participation in adult learning.

This section contains four key sub-sections. The first section presents a critical analysis of the work and influence of Houle (1961) and his model of motivational orientations to participate in adult learning activities. Socio-psychological factors

are then considered from the perspective of decision models of participation and life-cycle theory. Further to this, the post-modern view of participation is discussed, and finally, an exploration of the key challenges facing those who elect to participate is presented.

2.4.1 Motivational Orientations to Participation in Learning

An understanding of what motivates adults to participate in learning activities has long occupied the minds of those involved in delivering, developing or researching adult education. Cropley (1980) identified motivation to participate as the principal component of lifelong learning, stating that successful lifelong learning includes:

> *'…the skills necessary for learning (…), the motivation to carry out such learning, the image of oneself as a learner, a positive attitude to learning, the ability to set goals and evaluate the extent to which they have been achieved, a realistic appraisal of one's own potential, a constructively critical attitude to oneself…' (pp. 6-7).*

The implication within this statement is clear; according to Cropley (1980), learners must have an inherent 'readiness' to acquire new knowledge, skills and experience. Much of the participation literature acknowledges that this 'readiness' derives from the apparent or emerging socio-cultural, psychological or professional needs that drive individuals towards engaging in actions that fulfil or contribute towards achievement of goals (Radovan, 2003). Further to this, Wlodkowski (1985) proposes that adult motivation to participate in learning consists of a combination of four factors: successful learning; a sense of choice (volition); added value; and pleasure, a view which is line with one of the principles of andragogy that highlights the importance of internal motivators, and therefore suggesting a readiness to learn. Illeris (2003a; 2003b) highlights that not all participants are there through choice, suggesting that organisational and societal pressures, such as the 'war for talent' and the economic climate, directly or indirectly force individuals into up-skilling or acquiring new knowledge in order to compete for professional, social and financial opportunities.

The literature related to adult motivations to participate in learning is broad. Research that was conducted prior to the turn of this century focused principally upon generating descriptions or typologies of the 'adult learner' rather than the more contemporary focus of distinguishing by type of intervention, the nature of participation, the environment or occupational focus, or the development of practical frameworks with cross-subject generality and application (McGivney, 2001; Crossan et al. 2003; Desjardins, 2010). It should be noted that, motivated by a desire to bolster the reputation of theoretically driven work in the field of adult learning and education, there was a significant volume of academic output in the field of participation in the 1970s and 1980s in the wake of the seminal work of Houle that began in the 1960s.

Published research on the topic of adult participation can be dated back as early as the 1930s with the work of Hoy, Williams and Heath (Hoy, 1933; Williams and Heath, 1936, in Jarvis 2010). Williams and Heath undertook a significant volume of data collection, interviewing five hundred adult learners and presenting rich educational biographies. Later, Charnley (1974) stated that the book is 'a paradigm of research in adult education, because the human qualities revealed by the authors are timeless and, by no means least, because the faith expressed and exposed has inspired many of the men and women who have been concerned with adult education' (cited in Houle, 1992, p 105). According to Courtney (1992), early work on the subject from Nedzel (1952) and Love (1953) identified an underlying motivation towards learning. These studies were not concerned with the need to test existing theory, but to determine 'the process through which the individual must go before he decides to enrol for evening or extension studies' (Love 1953, p212, cited in Courtney, 1992). Love stated that to become an adult learner an individual must have a sense that education plays a key role in the solution of clearly defined problems and must consider education a positive experience in itself. Despite the age of this study it is significant in that it is rare to find a theory of participation in adult education (PAE) that considers both the origin of the learning need and the conditions under which the learning is conducted. In this case, participation is a series of actions underpinned by a number of psychological and circumstantial factors. Courtney (1992) suggests that Love pre-empts the concerns of Houle,

one of the most influential authors in the field of PAE, in terms of an interest in the discovery of motivational orientations to participate in adult learning through education.

The seminal work of Houle (1961), ‘The Enquiring Mind’, has formed the basis for much of the subsequent research into identifying and classifying reasons, or motivational orientations, for participation. Houle’s research places learners (participants) within a tripartite typology which identifies learners based on their reasons for participation. Learners are considered to be goal oriented, activity oriented or learning oriented. Goal oriented learners participate in learning for the achievement of established objectives developed following the realisation of a need or interest, whether these are practical and tangible (achievement of qualifications, certification etc…) or psychological and intangible (improved confidence, build self-esteem etc…). Contrary to this type, activity oriented learners participate for more social and personal reasons, which are not directly connected to the content or outcome of the intervention. Finally, the learning oriented participant is distinguished by a simple desire to know, and for them learning is a constant, almost habitual activity that permeates their entire lives.

Houle (1961) conducted structured interviews as a means of illuminating the meaning of ‘continuing education’. He provides an early rationale for such a narrow approach stating that his purpose was ‘not so much to cover even that small sector as to uncover its significance so that it may become the subject of later and fuller development’ (p4). It was his intention to understand the motives and beliefs of those individuals actively engaged in adult learning to the highest degree. Despite the academic rigour of Houle’s original work being questioned, researchers have gone on to utilise his typology, whether to assist and support their own conclusions or as a means of comparatively emphasising the academic, theoretical and evidential rigour of their own proposals. Sheffield (1962 cited in McGivney, 1993; 1964) was the first to test Houle’s typology on a larger scale. He developed a list of 58 reasons for participation, including 10 beyond the scope of the typology proposed by Houle. Factor analysis of the responses given by his sample of 453 participants of an adult learning activity, at 20 conferences in 8 US universities, revealed five identifiable motivational

factors – learning oriented, personal goal, societal goal, desire activity, and need activity. It is important to note that similarly to Houle's work, Sheffield's sample consisted of a homogenous group therefore it would be unwise to assume that his conclusions were representative of all adult learners (Boshier, 1971). These early studies of PAE provided a theoretical framework upon which further, wider scale studies could be positioned and rationalised, forming the basis for an understanding of participation in adult learning.

Johnstone and Rivera (1965) were the first to go beyond basic sub-sets of the population and conducted a national study that considered the nature and motivation of learners and the expected outcomes of their studies. They developed a conceptual framework of adult education based on two principal criteria – that learning was considered to be the acquisition of knowledge, information and skill, and that it must be acquired through organised instruction. This was the first of a series of major national (US) studies that presented consistent profiles of adult learners and their motivational orientations to participate in learning (Henry and Basile, 1994). On publication, the study made a significant impact as it provided the first comprehensive view of adult learners seen from a social sciences perspective (Houle, 1992). It highlighted the broad spectrum of participation opportunities beyond simply engagement in academic development, to include applied skills and practical competence, and emphasised the correlation between participation and the age and socio-economic position of the learner (Courtney, 1992). These criteria, and their focus on motive and outcome, are broadly similar to the focus of this research. There is little doubt that the strict criteria as to what constituted participation imposed on the study influenced the outcome, as did the societal and cultural conventions and trends of the day. Despite this, the typical adult learner identified by Johnstone and Rivera - white, better educated, in full time employment, married and with a relatively high income – was found to be consistent with many of the subsequent similar studies conducted up until the late 1980s (Aslanian and Brickell, 1980).

Johnstone and Rivera's (1965) work interpreted popularised views of why adults enrol and presented a series of eight statements outlining the broad situational

and dispositional reasons why participation could be helpful. Reasons were classified as: preparing for a new job; to help with the present job; become better informed; for spare time enjoyment; home-centred tasks; other everyday tasks; meet new people and escape from daily routine (an approach later developed by Bienart and Smith, 1998).

Johnstone and Rivera (1965) concluded that reasons for participation contain three variables: the nature of the subject being studied; the gender of the participant and; their socio-economic position. Boshier (1977) criticises this approach to classification development suggesting that the eight statements were 'not based on any coherent theoretical formulation' (p90). Boshier critiques the work of Johnstone and Rivera, claiming that their approach was based on anecdotal understanding and popular assumptions as to why adults enrol and participate. Despite this, Johnstone and Rivera's research has continued to be influential and highlighted the need and scope for subject specific research relating to both motives and participant profiles.

During the 1970s Boshier (1971; 1973; 1977; 1980) re-examined the work of Houle (1961) in order to explore and expand the detail of the original typology and to investigate its empirical foundations. Initial research produced by Boshier aimed to test Houle's typology within his home country of New Zealand and, in contrast to Houle, used a broad sample population. It was his intention to develop a model of adult learning participation that had 'cross-cultural generality' (1970, p 6). Boshier (1971) conducted interviews with participants and examined the work of Houle alongside the quantitative data and subsequent theories produced by Burgess (1971) and of Sheffield (1962 cited in McGivney, 1993; 1964). He subsequently developed the Education Participation Scale (EPS) - a range of 48 items that outlined reasons for participation in order to test Houle's three factor typology. It was his intention to eliminate response and position bias, to ensure anonymity and sample randomly from participants enrolled in three educational institutions in the Wellington area, and develop a factor analytically based measure of motivation for attendance.

Boshier (1971) proposes that participants are either 'growth' or 'deficiency' motivated, and that whilst influential in terms providing an initial conceptual

framework, the work of Houle (1961) lacks the complexity of factors needed to map adult participation. Boshier suggests that the three orientations are not pure types, and that each of the three orientations overlap therefore obfuscating their definitions and the relative value of the model itself. A modified equilibrium model was therefore presented. Boshier proposes that growth motivated participants demonstrate heterostatic participation behaviours as a means to achieving self-actualisation, in that they actively seek new or alternative activities and states that move them beyond the status quo. Deficiency motivated individuals demonstrate homeostatic behaviours in that they strive to maintain or achieve static conditions and stability, and wish to remedy a deficiency or imbalance in their life to achieve equilibrium. Boshier suggests that those seeking balance are likely also, in the longer term, to be seeking heterostasis as participants' motivation to participate in learning will change continuously as they engage in developmental tasks and experiences. This emphasised that participation is a unique evolutionary experience that can be positioned within the psychology of the individual, as well as their external circumstances and context.

Further to this, Burgess (1971) compiled one of the most comprehensive surveys of Houle's (1961) typology, in the form of a large scale questionnaire (1046 students) with the intention of exposing reasons for participation to detailed statistical analysis. Burgess proposed that in contrast to Houle's suggestion that there are individual dominant orientations which underlie the act of participation, participants are in fact characterised by more than one orientation. Boshier and Collins (1985) criticised the methods of analysis used, suggesting that Burgess ignored both key characteristics of Houle's typology and the rationale presented for it, and subsequently rationalised the statistical results by ignoring the problems created during the calculations when more than three factors were generated. Burgess insisted his orientation scores were normally distributed in order to progress to the focus of his research, which was an analysis of the relationships between orientation scores and other variables. Factor analysis conducted by Burgess revealed seven orientations to participate in learning through adult education, rather than three as proposed by Houle. These were described as: a desire to know; to reach a personal goal; to reach a

social goal; to reach a religious goal; to take part in a social activity; to escape and to comply with formal requirements.

Despite the criticisms the work faced, subsequent work by Houle (1979; 1980; 1983) himself relied on the data and conclusions produced by Burgess, but continued to classify participants by their dominant orientation, an approach also adopted by Morstain and Smart (1974) when they presented their six factor solution also based on Houle's original typology. Morstain and Smart presented their factors as: social relationships (to make friends); external expectations (complying with authority); social welfare (altruistic orientation); professional advancement; escape/stimulation (alleviating boredom) and cognitive interest (learning for its own sake).

Courtney, (1992) suggests that the work of Houle (1961), Boshier (1971, 1973, 1977, 1980), Sheffield (1964), Burgess (1971; 1974), Morstain and Smart (1974) and others focused on motivational orientations to participate centred principally on the 'personality or temperamental precursors of the act of PAE…'(p54). He suggests that such focus on personality traits and dominant motivational orientations for participation accounts for the 'origin of the learning need rather than the factors governing the actual decision to participate' (p90). Much of the Motivational Orientation literature does not account for the personal and psychological circumstances surrounding the decision to participate, and therefore is not considering all of the multi-levelled influences on participation and the specific reasons *why* individuals participate in adult learning or, in fact, why they do not. This decision making process is explored in a range of paradigms that evaluate the forces influencing decisions to participate.

2.4.2 Decision Models

Decision models are a collection of independent theories which focus upon the apparent psychological or socio-psychological forces, conditions or factors influencing adult participation in learning. Courtney (1992) highlights that these are not theories which track and analyse rational, linear decision making – the process of reviewing and considering alternative courses of action based on a personal view of potential outcomes – rather these models attempt to map the

apparent forces which function during the decision-making process. This concept borrows from the seminal work of Kurt Lewin (1951) and the ‘force field analysis’, often cited in discussions of organisational change. Lewin presented interesting insights into the nature of change, and particularly change that has come about from a deliberate quest to alter the status quo (Hayes, 2010). Lewin (1951) stated that a position of ‘no change’ was not simply the result of no activity, but simply a position of stability whereby the balance of forces is maintained. It is when the balance of resisting and driving forces is altered, deliberately or otherwise, that change occurs.

The force field effect is cited by Miller (1967, cited in Courtney, 1992) in his participation by social class model, which highlights the positive and negative forces for participation. This approach further borrows from socio-psychology whereby the work of Maslow (1943) is referenced, with Miller relating decisions to participate to stages within an individual’s life and connecting these with the resulting learning needs. The model relates directly to Maslow’s hierarchy of needs pyramid, whereby a number of human needs are presented, with the ‘lower’, basic needs having to be satisfied before the increasingly less basic ones above can be addressed and met, thus emphasising links to psychological and socio-psychological structures. Miller suggests early developmental years (childhood and adolescence) are occupied with securing love, friendship and security. Reaching adulthood drives an individual to explore opportunities to grow self-esteem and to acquire symbols of achievement (promotion, qualifications etc…) and status. To complete the picture, Miller references the concept of self-actualisation, which he cites as the state an individual aspires to as they mature and acquire significant life experience. This is a reflective and reflexive stage of life.

Critics of Miller’s (1967, cited in Courtney, 1992) class based model questioned the notion that the ‘middle classes’ view learning and education as a means of self-actualisation, but rather it is instrumental, and further challenge his view that it is only the ‘lower classes’ that bind education to their jobs and employability (Havighurst, 1963). The model reveals its age through a set of rather anecdotal assumptions about adult participation in learning. Despite this,

the principles of the force field model can be used to map the driving and restraining forces at play during the decision making process. Courtney (1992) suggests that such articulation of participation in learning and education as a function of the balance between driving and restraining forces is a particularly dynamic one. Not only does Miller consider the origin of the learning need (driving forces and motivational orientation), he acknowledges the factors and conditions that influence the decision to participate (restraining factors), thus presenting what appears to be a wider and more holistic lens through which to view the circumstances surrounding participation.

The work of Rubenson (1978) shares with Miller a sense that PAE is the outcome of a number of influential 'forces' and shares his interest in social class as an influencing variable. The key factor within Rubenson's model is the influence of present, rather than past, circumstances upon PAE, thus highlighting the relevance of the immediate 'learning need' as being the key to PAE, rather than past events and circumstances. This research challenges Miller's theory of social class as the principal factor in participation, using longitudinal data to demonstrate that in an adults' life span they are very likely to be involved in some form of planned and organised adult learning. Rubenson therefore places importance on the current social and psychological status of an individual as a predictor of participation, rather than an observation of their past (Courtney, 1992).

Rubenson (1978) further develops Miller's (1967) approach by questioning the 'missing link'. Miller fails to provide a satisfactory explanation as to how an identified learning need leads to the act of participation in a learning activity. Rubenson acknowledges the link in his 'perception of needs' stage but fails to investigate the content of the relationship between perception and current needs as driving forces. The limited explanation draws, once again, from the work of Kurt Lewin alongside expectancy theorists such as Vroom (1964) and Porter and Lawler (1968) and their discussions on the concepts of expectancy and valence. According to Rubenson's model, the expectancy of an individual will draw from past experiences an understanding of the social and psychological structures within their immediate environment and personal

values and traits to predict the expected outcome of participation. The ‘valence’ or outcomes are based on the relative value placed upon the experience – if outcomes are attractive then participation is more likely to occur (Hayes, 2010). It is the objective of this study to consider the relative strength of both the past and present influences on participation in order to provide the holistic, lifewide view of the circumstances surrounding participation. Therefore, an exploration of both past and the present has been included in the research instruments.

Cross (1981) attempts to move beyond the relative simplicity of Miller (1967) and Rubenson’s (1978) approach that suggested the interaction of forces leads to a definable, single act of participation, to the suggestion that participation is, in fact, the result of a chain of events and actions. Cross (1981) rejects the notion that PAE is a single action occurring after a period of consideration; rather it is positioned within a stream of actions made up of habitual and routine activity alongside new and alternative undertakings. Cross’s model adopts the expectancy/valance notion drawing the concept together in to a single category entitled ‘attitudes about education’ which is linked with a period of self-evaluation and an awareness of how other people view you and your actions (Courtney, 1992). Further to this, the idea of life transitions and the development of goals as a result, are derived from the work of Havighurst (1973) and life cycle theory, whereby an adult engages in ‘developmental tasks’. These tasks are situated somewhere between being a societal demand and a personal need and are often in response to a life transition (social, cultural, environmental, professional etc…) that must be ‘achieved at or about a certain phase in life, if a person is to be judged and to judge himself as a competent person’ (p. 19).

The final factor influencing participation presented by Cross (1981) is ‘information’. In other words, the level of awareness an individual has in terms of educational opportunity and access to information about it. Cross views her model in terms of a balance or, in fact, an imbalance of factors – opportunity may be there, but motivation can be weak or absent. It is the exploration of the unique balance of these factors experienced by the individual that is of interest to this research.

Cookson (1983; 1986) presents what is considered to be one of the most comprehensive decision models in the field of adult participation, and mirrors the causal factors paradigm presented by Cross (1981). Cookson adapts the largely abstract, multi-disciplinary model of ISSTAL (Interdisciplinary, Sequential Specificity, Time allocation and Life span), developed by Smith and Macauley (1980), that sought to define and elucidate social participation in a wide range of forms (i.e.: volunteering, politics, social groups etc…). ISSTAL is transposed by Cookson into a model that focuses on the time allocation and life span variables that lead to participation, and that exposes aspects of human nature that influence PAE (Henry and Basile, 1994). Participation, in this context, is seen as a voluntary and discretionary action influenced by a series of inter-connecting variables. These variables include: external contextual factors (geography, culture, community etc…); social background and social role (perception of education, social and economic status, life experience etc…); personality and intellectual capacity; attitudinal dispositions (a factor derived from the original work of Houle (1961) and his theories on motivational orientations); retained information (access to, and awareness of information relating to educational opportunities) and lastly, situational variables, which refers to the immediate life context influencing the decision to participate. In this work, Cookson draws together many of the key aspects of interactive decision models, borrowing from the seminal work of Houle, through to the work of his peers, such as Rubenson and Cross. Courtney (1992) considers the model so 'cumbersome and statistically daunting' that it presents a challenging project to test it (p71).

The study of decision models is of particular interest to this research, and chiefly those presented by Cross (1981) and Cookson (1983; 1986), which presented a view of participation that considered the wider forces that influence the decision to participate. These models consider both societal demand and personal need, and consider the socio-cultural and psychological factors relating to participation in learning through education. Such approaches begin to allow us to develop a clear line of sight from the origin of the learning need through to the factors influencing the final decision to participate, providing a conceptual platform on which to build this research and fulfil the objectives of this study.

2.4.3 Post-modern approach

In addition to the motivational orientation, life-cycle and decision paradigms presented, Manninen (2003) presents a fourth way, a view of adult participation in learning that responds to the changing profile of the adult learner – from student to consumer. Within this framework decisions are made based on images and feelings experienced by the individual rather than on rational reasoning and evidential facts. The post-modern view of decisions to participate is based on the unique image of education and the reality it represents to an individual. Manninen borrows from marketing management literature in his description of the decision making consumer, citing Jensen (1999) and the 'Dream Society', wherein consumer decisions are based more on 'emotional issues and feelings than on quality, facts and reliability' (p71). He suggests that it is culture and its symbols, language, rituals and shared experiences that influence the construction of our reality, and therefore directly influences our decision to participate.

The 'Dream Society' uses images and emotions relating to participation as mediators in the basic process, with positive and negative experiences, as well as local sources of information (colleagues and friends), influencing the way in which individuals perceive the learning interventions available to them. Similar to the work of Knowles et al (1984) and Cropley (1980) discussed in section 2.4.1, Manninen's (2003) research suggests that an individual's past experience will influence their readiness to receive and assimilate information regarding learning opportunities. This influence is acknowledged as being one single element in a complex process of thought and reasoning, but a crucial one nonetheless.

The postmodern perspective of 'images' that influence decisions to participate are not entirely dissimilar to some of the more conventional notions of participation, in that individuals will have a notion of their ability to learn and the usefulness of the learning itself. The Decision models of Cross (1981) and Rubenson (1978) form the theoretical roots of this new perspective, but with key differences relating to the influential variables – the psychological factors of the traditional paradigm (self-evaluation, self-awareness, personal values and

traits), versus the sociological and consumerist variables (culture, heritage, past experience) of the post-modern. It is the multi-dimensional perspectives that a combination of these paradigms can offer, and that this research has drawn upon in order to view the reasons for participation in a detailed and inclusive manner.

2.4.4 Challenges to participation

In addition to the enabling factors and reasons for participation explored so far in this chapter, it is important to complete the loop by considering the challenges faced by adults when choosing to engage in learning. Whilst it is not the purpose of this research to investigate those that do not participate, regardless of desire to do so, one of the principal objectives is to investigate the challenges experienced by participants on their journey towards participation. This objective supports the paradigm presented in the previous section in that the decision to participate is not wholly managed and controlled by the individual, and that the decisions are often influenced by the socio-psychological, socio-cultural and professional worlds they exist within (Jarvis, 2010).

Much of the early research into barriers to participation cite the most influential as being the time and cost implications of engaging in adult education (Carp et al., 1974; Scanlan and Darkenwald, 1984 both in Henry and Basile, 1994). Houle (1980) cited studies that proposed a lack of awareness of opportunities and limited value of educational achievement, and Charnley et al. (1980 in Jarvis, 2010) focused upon a lack of flexibility in the offering made by the institution as significant challenges. McGivney (1990) presented the ten key barriers to participation that emerged from his research. These include: lack of time; negative school experience; lack of funds; lack of confidence; distance from the institution; lack of childcare; mode of delivery; education is regarded as irrelevant to unskilled people; lack of transport; and finally, a reluctance to go out at night (as cited by women and the elderly). These present a holistic view of the individual from a very broad demographic by referencing practical, personal, psychological and, to an extent, the professional dimensions.

Much of the more recent literature on barriers to participation focuses on those who do not participate, rather than those that have faced problems on their journey towards participation, and is dominated by large scale, generic surveys of non-participation in work and non-work related education. These are, however, useful in providing an understanding of potential deterrents to participation and could present the key to the development of solutions, support frameworks and sustained programme delivery that enables participation (Rubenson, 2010b).

Similar to their framework relating to reasons for participation, Johnstone and Rivera (1965) cited situational and dispositional barriers as reasons for non-participation. Situational barriers included all the reasons external to the individual arising from one's situation, including financial constraints, availability and cost of childcare, transport restrictions etc… Further to this, dispositional barriers related to the personal attitudes and beliefs of the individual relating to organised education and learning. Following a survey and analysis of research and theoretical publications in the field Cross (1981) added institutional barriers, in the form of any factors relating to the educational institution the individual seeks to join, that impede or discourage participation such as fees, location, entry requirements, timetabling or mode of delivery. Darkenwald and Merriam (1982) later redefined Cross' (1981) dispositional barriers as psycho-social, pertaining to the beliefs, attitudes and perceptions about education or self as a learner. They then expanded the paradigm with a fourth classification of informational barriers (a classification previously grouped within the Institutional barriers) that relates to a lack of course and supporting information and the prospective participants' lack of impetus to source and utilise the information.

Further studies have been conducted to determine barriers to participation in a higher educational environment (Gallay & Hunter, 1979; Hengstler et al., 1984; Scanlan & Darkenwald, 1984). The results of these studies were generally consistent with Cross' categorisation of the three groups of barriers. Results of these studies indicated that the costs of participation are a major situational barrier, along with family commitments and job responsibilities, childcare, and transportation issues. Institutional barriers of note within these studies include a

lack of financial support, access to administrative services, strict entrance requirements, restrictive policies, and perceptions of program benefits. Dispositional barriers reported were fear of rejection, low self-esteem, fear of the institution itself, lack of interest and commitment, unclear academic goals and poor former academic achievement.

Many of the recent large-scale surveys conducted in this area once again employ some, if not all, elements of Cross's classifications with situational and dispositional challenges cited as dominating the responses. These large scale surveys (European and international) such as the EU barometer on lifelong learning (CEDEFOB, 2003) and the International Literacy Survey (OECD, 2000) revealed the general issues relating to participation in adult learning, highlighting a lack of time and family commitments as significant obstacles. Barriers to participation in work related studies further revealed the existence of institutional barriers such as cost, mode of delivery and availability of relevant courses. Rubenson (2010b) notes that studies which focus on active participants in education are almost as likely to cite situational and institutional barriers as their non-participating counterparts. It is therefore useful to note that rather than the distinction being in the form of the barriers themselves, he suggests that the difference between participants and non-participants comes in the form of a subjective view of the relative outcomes and rewards of participation (Jonsson and Gahler, 1996, cited in Rubenson 2010b).

Dispositional barriers are often associated with psychological challenges to participation and appear more frequently in studies focusing on non-participants, citing an apparent motivation to study and learn in participants as a reason not to explore such barriers. Dispositional barriers of non-participants are often found to represent an individual's readiness to participate and their perceptions of the value of education, their own abilities, bad prior educational experiences and the belief that they are too old to engage in such activities. When comparing participants and non-participants, Rubenson (2010b) suggests that dispositional barriers dominate, and that the principal impediment to participation is simply a lack of interest in learning and education.

Whilst much of the modern research into barriers adopts the framework of situational, dispositional, institutional and informational deterrents in some way there are two key viewpoints relating to the conceptualisation of barriers. Firstly, the view that barriers are obstacles that preclude individuals or groups from participation, with the proposition that if these barriers can be overcome and individuals are enabled through necessary support mechanisms, then participation would be achievable and unlimited. In this instance, concern would only be given to non-participants and would consist of a broad demographic profile and little subject specific data. The alternative view would be to consider barriers as challenges faced by some more than others, rather than insurmountable barriers faced by specific groups. In this case, challenge would simply affect the extent of participation, rather than the act itself. It is in this instance that it becomes relevant to question active participants (Rubenson, 2010b). It is the purpose of this research to achieve the latter by focusing on a group actively engaging in a specific programme of professional learning through education. Given the potential challenges and barriers to participation that have been presented here, it is essential to close the loop and reemphasise the role of enabling factors and forces in encouraging and supporting the act of participation in adult learning through education. It is apparent therefore that consideration must be given to the ways in which institutions, society, communities and organisations can support and enable the decision to participate, as well as active participation itself.

2.4.5 Section Summary

Key paradigms of participation reveal an interest in the varying factors influencing participation in learning. Many of the paradigms presented here represent a psycho-social view of participation. Decision models discuss the driving and restraining forces relating to the circumstances and context surrounding the decision to participate, but do not appear to elaborate on the specifics of what these factors are. In line with these decision models, life cycle theory views participation in terms of 'developmental tasks' directly influenced by societal demand and personal need, often in response to an important life transition, but again seem only to consider antecedents of participation rather than participation as an action or activity.

Motivational orientation paradigms, to an extent, fill this gap by exploring what is meant by context, circumstances and disposition, whilst focusing upon the origin of the learning need in terms of a readiness to learn, the prevailing attitude towards learning, and past experiences of learning. Contemporary viewpoints stress the influence of emotional factors and an individuals constructed view of reality guided by past experience. The work on motivational orientations to participate, reasons for participation and challenges to participation stems from the seminal work of Houle (1961), with much of it remaining simply adaptions of the original idea. His model, whilst influential, serves to somewhat pigeon-hole participants, thus tending to ignore the diverse range of forces that may drive an individual to participate, and by the deliberate exclusion of those participating at degree level during the research, limits the application of the model in the field of adult learning and education. Subsequent testing of Houle's model and its redesign by academics such as Sheffield (1962 cited in McGivney, 1993; 1964), Johnstone and Rivera (1965), Burgess (1971), and Boshier (1971; 1973; 1978; 1980) simply served to repeat some of the limitations of the original model, and chose to narrow down their models to predetermined reasons and factors using a homogenous group of respondents. As stated by Courtney (1992), such models focus too heavily on personality traits and motivational orientations rather the reasons for participation itself. Similarly, the key paradigms relating to the barriers and challenges to participation are dominated by classifications, many of which are redevelopments of the work of Johnstone and Rivera (1965) as discussed in sections 2.4.1 and 2.4.4 (Cross, 1981; Darkenwald and Merriam, 1982; McGivney, 1990).

In order to develop a clearer understanding of the range of models presented here, and to allow for sense making to occur, tables 2.1 and 2.2 presented on the following pages, map the models and paradigms related to the seminal literature discussed within this section for the purpose of this study. The component parts of each are grouped thematically within four key dimensions identified from within these existing models and paradigms.

Dimensions / Key Authors	Psychological	Professional	Practical	Personal
Houle (1961;1979; 1980)	Goal Oriented, Activity Oriented, Task Oriented			
Sheffield (1964)	Learning Orientation, Desire-activity Orientation, Personal Goal Orientation, Societal Goal Orientation, Need-activity Orientation			
Johnstone and Rivera (1965) – (Situational and Dispositional Reasons)	Escape from daily routine	Prepare for a new job Help with the present job	Become better informed Home centred tasks Other every day tasks	Spare time enjoyment Meet new people;
Boshier (1971; 1973; 1977)	Being Motivated, Deficiency motivated			
Burgess (1974)	Desire to know; Desire to escape	To comply with formal requirements		Desire to reach a personal, social or religious goal Take part in a social activity
Morstain and Smart (1974)	Escape/stimulation Cognitive interest	Professional advancement	External expectations	Social relationships; Social welfare
Aslanian and Brickell (1979)		Career (new job, change in demands of job, promotion)		Family (Birth, marriage, divorce, death). Leisure, Art, Health, Religion Citizenship
Cross (1981)	Dispositional		Institutional	Situational
Wlodowski (1985)	Enjoyment		Value Volition (a sense of choice in learning)	Success
McGivney (1990)	Finding diversion or stimulation	Developing professionally Meet requirements of employers	Acquiring knowledge;	Developing personally; Meet new people; Helping their community; Fulfilling religious need
Beinart and Smith (1998)		Required by Employer Career development and/or new employment Do something interesting (with work connection)	Improve knowledge or skill	Do something interesting (no work connection) To meet other people
Manninen (2003)	Decisions to participate based on images and feelings			

Table 2-1: Map of Key Literature – Reasons for Participation

Dimensions Key Authors	Psychological	Professional	Practical	Personal
Johnstone and Rivera (1965)	Dispositional Challenges (relating to internal attitudes and beliefs that impede participation)		Situational Challenges (relating to individuals external situation – finances, spare time, child care)	
Carp et al. (1974)	Dispositional barriers		Institutional barriers	Situational barriers
Charnley et al. (1980)			Cost of participation; Lack of Time; Lack of flexibility in learning provision	
Cross (1981)	Dispositional Challenges		Institutional challenges	Situational Challenges
Darkenwald (1982)	Dispositional Challenges		Institutional challenges Informational challenges.	Situational Challenges
McGivney (1990)	Negative school experience; Lack of confidence		Lack of Time; Lack of money Lack of daytime opportunities; Lack of transport; Distance from the institution; Lack of childcare	Reluctance to go out at night; Education regarded as irrelevant
Sargant et al. (1997)		Work commitments	Finance; Lack of childcare; Lack of time	Not interested in learning Feel too old, ill or disabled.
Beinart et al. (1998) National Adult Learning Survey		Too busy with work	Otherwise occupied; Lack of finance; Too busy with family Lack of knowledge regarding learning opportunities.	Would rather use free time to do other thing; Lack of interest in learning; Felt too old to learn
La Valle and Blake (2001) National Adult Learning Survey	Nervous about returning to classroom (confidence); Concern over ability to keep up with the course.	Work commitments	Time Constraints; Cost; Lack of knowledge regarding learning opportunities; Lack of childcare Lack necessary qualifications; Difficulties with reading and writing.	Felt too old to learn Health problems/disabilities

Table 2-2: Map of Key Literature – Challenges to Participation

Table 2.2, related to challenges to participation, demonstrates few professional issues facing participants and potential participants. Practical challenges are dominant in the broad studies explored. Table 2.1, representing reasons and motivational orientations, suggests that the identified dimensions are all well supported. Overall, the dimensions are supported by descriptive, and often prescriptive, typologies or statements that do not appear to be flexible enough to be applied to different groups of learners participating in the broad spectrum of learning opportunities, wherein specialist factors that encompass the nuances of the life-world of those learners can be generated.

The decision models, discussed in section 2.4.2, presented most notably by Miller (1967), Rubenson (1978), and Cross (1981), utilise the notion of 'force field' analysis which contributes to an understanding of the many and varied reasons individuals choose to participate, or not. This study proposes that the literature related to motivational orientations considers the origin of the learning need, the *what* question, wherein the trigger to learning is the focus. Alternatively, decision models and life-cycle theory consider *how,* by focusing upon the factors and conditions influencing the decision, and the ability, to participate. It is apparent that these models predominantly draw from socio-psychology and that a single, flexible and open model of participation that supports the consideration of not only the *what* and *how* questions, but also *why* is needed in order to fully explore the more instrumental dimensions influencing participation in a particular learning activity, such as *practical* implications or *professional* outcomes. These models do represent many of the major factors relating to reasons for participation and the related challenges experienced by learners, and provide insight in to the tangible reasons for participation, such as practical circumstances and requirements, as well as contextual factors including cultural, social and professional pressures and influences. These are further balanced by models of motivational orientation that attempt to reveal intangible factors such as the notion of self-actualisation and self-awareness as a driver to participation. These models range from a consideration of the origin of the learning need, to the decision to learn, to the prevailing circumstances and context to the role of past experience and of current personal values.

The common issue identified within this analysis is that these models tackle only one element of the learning journey at a time, that of either *reasons* for participation or the *challenges* to participation, and present results rather than a framework, with no evidence of an explicit model or paradigm of the *enablers* of participation. None appear to consider, or attempt to capture, the balance of all these factors viewed from the contextual dimensions of the learner. There is little evidence of a view of participation from origin to action, within a holistic model of participation that accounts for the range of psychological, practical, personal and professional reasons for participation in learning, the associated challenges faced by learners, as well as the range of enabling factors related with active participation in a learning activity.

2.5 Conclusions

The study of the diverse range of paradigms related to adult learning and participation has served to generate a fuller picture of the possible reasons why adults participate in learning activities, the challenges they face, and the associated enabling factors. The variety of learning activities available to adults, and the varying experiences individuals have of participating in them, demonstrates that learning can and does occur life wide and lifelong, and that social, organisational and cultural contexts have the potential to impact upon, and influence, engagement with learning activities.

This chapter has revealed that previous research on adult participation in learning has continuously sought to prove, disprove or adapt existing typologies, with a view to developing models with empirical evidence to support them. Research has focused on generating groups of single identified factors, motivational indicators and specific challenges, which influence engagement with, and participation in, adult learning. This study argues that learning is a personal journey and that participation is a unique phenomenon for the individual involved, influenced by prior learning experiences and attitudes towards learning itself. It seems apparent from the literature, however, that this journey must be supported and enabled by the elements that constitute the learners 'life world' – society and community (Hayes et al. 1995), employment (Pedlar, 1991) and the prevailing culture (Schein, 1992; Burgoyne, 1995; O'Keeffe, 2002; Tran, 2006) as discussed in section 2.3.3 of this chapter. It is, therefore, the responsibility of society, the workplace and the learning providers to provide expansive learning environments to further empower and enable an individual's investment in learning, an investment that stems from their own willingness and capacity to learn - their own *personal and psychological drivers*.

The purpose of this research is not to further test what has gone before, but to be informed by these studies, with the key outcome of this literature review being the development of an original conceptual framework. It is intended as a tool to explore the four dimensions identified in the literature addressed across

the three key areas of interest; that of the enablers, reasons and challenges related to participation in a learning activity from a lifewide perspective. This study will demonstrate the relative strength of these key areas and dimensions for a particular group of individuals engaging in such an activity, in order to reveal the complete context of their participation in adult learning. The development of this framework fulfils research objective number 1:

…to develop a conceptual framework through a critical review of the key literature in the literature in the field of adult learning and that of participation in adult learning.

According to Miles and Huberman (1994), 'a conceptual framework explains, either graphically or in narrative form, the main things to be studied – the key factors, constructs or variables – and the presumed relationships among them' (p. 18). The framework enables analysis of the *what, how* and *why* factors relating to participation in an adult learning activity. This approach can reveal the multiple explanatory factors, instead of single influencing variables and causal mechanisms, therefore analysing the whole situation where different parts are in constant interaction.

The resulting conceptual framework matrix (table 2.3) influences the structure and content of the research instruments used and subsequent analysis of the results. The general usefulness of the matrix has been evaluated by its capacity to relate to existing research and, most importantly, by its ability to stimulate new research and improve practice.

Dimensions → Key Factors ↓	**Psychological** Definition: Affecting or arising in the mind, related to the mental and emotion state of a person	**Professional** Definition: Related to, or connected, with a profession and/or job	**Practical** Definition: Concerned with the actual doing or use of something	**Personal** Definition: Affecting or belonging to a particular person rather than to anyone else
Reasons Definition: The cause, explanation, or justification for an action or event				
Challenges Definition: A test of one's resources or abilities in a demanding but stimulating undertaking		The Context of Participation in Adult Learning Activities		
Enablers Definition: To supply with the means, knowledge or opportunity				

Table 2-3: Original Conceptual Framework Matrix (Blank)

The **three key areas** explored and developed within this review form the spine of the matrix: i) **Reasons** for participation, ii) **challenges** individuals face before and during participation and, iii) the **enabling factors** and influences that promote and enhance participation. These are then broken down through **four distinct dimensions**. These dimensions are: i) the **professional,** ii) **the psychological,** iii) **the practical** and, iv) the **personal** facets of the participants 'life-world' (lifelong and lifewide), as identified in the literature. Each of the resulting **twelve fields within the matrix** is explored within the context of the identified research setting using the methods outlined in the following chapter. This study proposes that it is the unique combination of these dimensions of participants 'life world' that drives active participation in adult learning activities. It is the intention of this research to trial this proposed conceptual framework matrix as a means of exploring the relative strength and influence of each cross section and its ability to reveal the lifewide and lifelong context of participation within the identified research setting.

The following chapter outlines and justifies the chosen research methods in light of the conceptual framework matrix described and presented within this section.

3 METHODOLOGY

3.1 Introduction

The purpose of this chapter is to provide an outline of the philosophical paradigm that has guided and influenced the research journey, including the methods adopted, analysis techniques used, and the manner in which conclusions are drawn from the literature and data gathered. The chapter begins with a consideration of the ontological and epistemological paradigms that supported this research. Limitations of alternative research philosophies are considered in order to frame the relevance and suitability of the paradigm selected, and the impact and influence of the chosen philosophy on the data collection methods used, both qualitative and quantitative, are then considered and evaluated. Further to this, a full explanation of the sampling strategy adopted is presented, along with the demographic profile of the respondents. This is followed by a detailed outline of how the research instruments were developed and administered along with an explanation of all analysis techniques used. Consideration is given to the ethical implications of this research.

A triangulated mixed methods approach has been selected, in the context of a detailed consideration of alternative research paradigms, as the most appropriate way of fully investigating the key factors and dimensions relating to adult participation in professional learning within the specific context of this study.

3.2 Research Strategy

Consideration of research philosophy is essential in order to develop a framework that reflects the basic beliefs and world view (ontology) adopted by this study. It is vital to identify the guidelines by which this research has been conducted (epistemology and methodology), generating the most appropriate methods and techniques that can be adopted to fulfil the research objectives in hand. Critical realism, which assumes an objective reality but recognises that it is imperfect, has been adopted as the broad guiding research ontology, and is supported by a post-positivist epistemology (Dias and Hassard, 2001). Overall

this position rejects the tenet that measurement is infallible and accepts that a form of triangulation, using mixed methods, is essential in order to give as accurate a view of reality as possible. This approach is further influenced by relationship of the researcher to the target population, which highlights a need to state the related axiological implications. The target population is made up wholly of matriculated students of the University where the researcher is employed. Further to this, the researcher has taught the target population in a classroom environment and is the programme leader for an associated programme (MSc HRM full time cohort). Throughout the research process it is essential that the researcher acknowledges his or her position in relation to the sample, and recognises that, when gathering the views, opinions and behaviours of the students, they may influence the data gathered by the way in which the methodological approach is developed, questions are framed and the analysis techniques are selected. Cousin (2009) encourages a researcher in this position to be reflexive and acknowledge their place in the research. Similarly, Christians (1989) highlights that 'dialogue is the key element in an emancipatory strategy that liberates rather than imprisons us in manipulation or antagonistic relationship', and this is reflected in both the research philosophy and design, and particularly within the ethical mechanisms adopted (p 148, cited in Denzin and Lincoln, 2000). The purpose of this study is to ascertain personal opinions and behaviours relating to the respondents own engagement with the programme, and respondents were not required to comment or provide answers to questions that focus on module or programme feedback. Further to this, it is acknowledged that it is not the role of the researcher to report or dictate, nor should it be within their remit to judge and interpret on behalf of others. It is the role of the researcher to simply understand, describe and explain.

It is also acknowledged that subjectivity and bias is inherent in all individuals, and that the researchers' relationship with the target population has the potential to impact on the research process and outcomes. Therefore, the most reliable approach in the quest to achieve a level of objectivity is to triangulate across multiple fallible perspectives. The following section explores and defends this approach in further detail.

3.2.1 Research Philosophy

The ontological position of critical realism is appropriate to studies of education and management and offers a 'middle ground' perspective within the ontological paradigm presented by Burrell and Morgan (1979, see Appendix 9.2), which allows for the use of causal language and discourse as a means of 'describing the world' (Easton, 2009, p119). The definition proposed by critical realists is that they are effectively anti-positivist, but continue to position themselves within an ontology of modified realism. *Critical* realism has developed from realist roots and appears to be based on two underlying interpretations of what realism really means. The concept of realism, or the belief of realists, implies acceptance of the 'way things are' and accepting the literal truth of a given situation or circumstance. In addition to this, realism can be defined in contrast to the tenets, for example, of post modernism. This suggests that knowledge is relative, promotes the value of representation as a powerful means of insight and education, and that any account is just one way of representing social reality (Bryman and Bell, 2003). Benton and Craib (2001) argue that critical realism draws from the ideas of realism that claim 'resigned acceptance', believing that the real world 'exists and acts independently of our knowledge or beliefs about it' (p120). This is further supported by the work of Sayer (2000), who presents eight key assumptions (Appendix 9.3, points 1, 4 and 5) of critical realism that suggest a reality that is 'out there' and that the world is knowable and through research can be revealed, revelations which can be utilised, and can be useful in informing change. Bhaskar (1998) presents this as a form of 'explanatory critique' (p136).

From the naive realists' perspective, a perspective often adopted by those studying in the natural sciences, reality can be measured and controlled – a belief espoused by traditional positivists. The critical realist perspective presents an apparent contradiction in its acceptance that reality is socially constructed, but resolves this dichotomy with the caveat that it is not entirely so (see appendix 9.3 as previous, points 2, 3, 6 and 7). According to Easton (2001), the 'real world breaks through and sometimes destroys the complex stories that we create in order to understand and explain the situations we research' (p120). Critical realists, as a result of this belief, simply attempt to further the

understanding of reality, the 'why' question, by exposing 'reality' to a wide and detailed examination without the Cartesian anxiety demonstrated by positivists in their attempt to *prove* it, an approach often criticised as being naïve objectivism (Guba and Lincoln, 1990; Johnson and Duberley, 2000).

Bhaskar (1998) attempts to shed light on the epistemological implications of adopting this critical realist ontology. He suggests that critical realists adopt a stratified ontology and therefore consider in their research the empirical, the actual and the real – an implied dualist approach to research. Critical realists accept the fallibility of knowing and reality and that interpretation of observed events is inevitable. To resolve this difficulty, they believe that it is epistemologically relevant to collect and explore data across multiple fallible perspectives in an attempt to explain and understand a phenomenon, with objectivity remaining a 'regulatory ideal', whereby 'replicated findings are *probably* true (but always subject to falsification)' (Guba and Lincoln, 1994, p110).

Post-positivists attempt to achieve this 'regulatory ideal' by openly stating their axiological assumptions and relationship with the research subjects. This approach is simply one of honesty and transparency, allowing the reader to adjust their understanding or interpretation of the research accordingly. In contrast to this, the positivist tradition had claimed that post-positivism is simply an attempt to advocate subjectivism and a lack of rigour within the research. Further criticisms of post-positivism focus heavily on the lack of generalisability, given the pre-occupation with rigour and the stripping of context. It is suggested that such an approach can lead to a reliance on methods akin to the natural sciences (quantitative methods) (Patomaki and Wight, 2000).

In an attempt to resolve such criticism, Sayer (2000) espouses the use of a variety of research methods within a post-positivist epistemology, stating that the approach is tolerant of mixed methods, with the final selection being dependent on the subjects and the research questions in hand. The sequential nature of the data collection in this study and the adoption of a triangulated, mixed-method approach allows for rich data and insights to be presented.

3.2.2 Research Design

In this study a linear, mixed methods approach using types of thematic analysis (quantitative and qualitative) has been achieved, firstly through the use of an online questionnaire, and subsequently through one-to-one interviews. This has allowed findings to be triangulated through the categorising of data, the extraction of themes, and the interpretation of meaning (Easton, 2009; Saunders et al, 2007). Utilising critical realist ontology, a post-positivist epistemology and a mixed method, triangulated methodology leads to the revelation of underlying structures and mechanisms which cause and perpetuate particular phenomena (Easton, 2009; Cresswell, 2007). This retroductive approach serves to explain the actions and experiences of the subjects providing a representation of their views.

A process chart is presented in figure 3.1 below outlining the development and order of the research design.

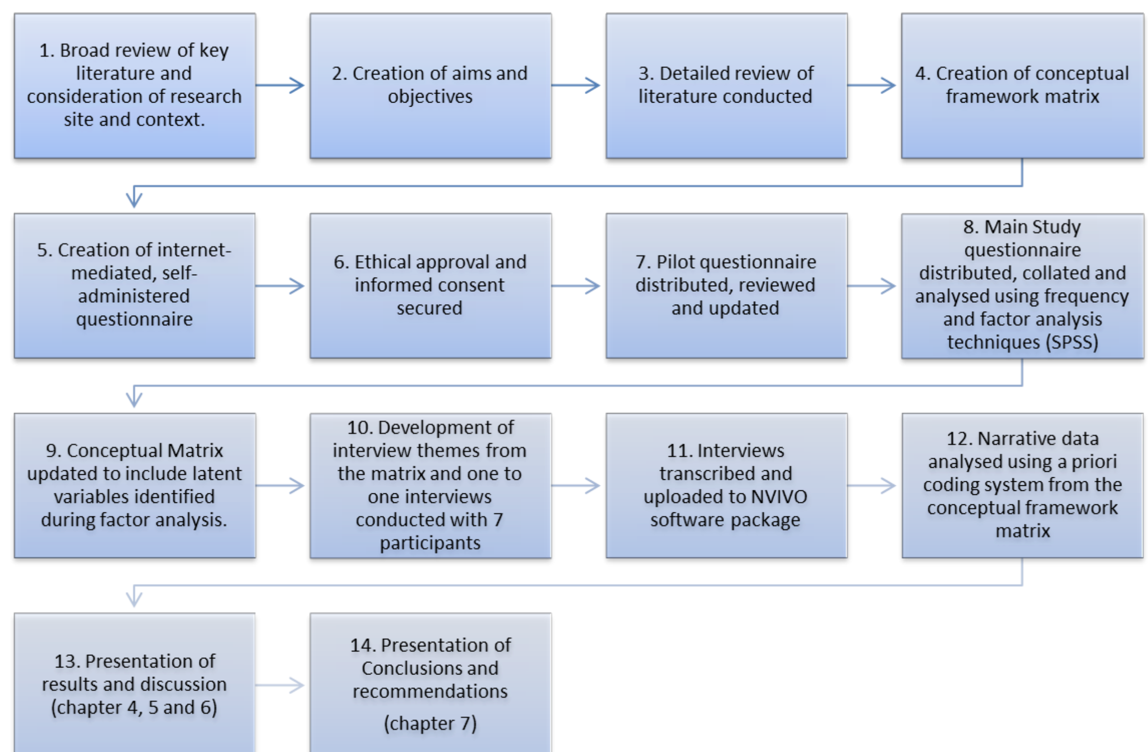

Figure 3-1: Research Process Flow Chart

3.1.1.1 Quantitative Methods

Surveys and questionnaires appear in many forms including the standardised formal interview, the self-administered questionnaire (postal/online) and the group administered questionnaire (Oppenheim, 2000). The choice of approach adopted must be carefully aligned with the research objectives and conceptual framework matrix, and must consider a number of factors including the characteristics and size of the chosen target population and sample; the type and number of questions that need to be asked and the need for accurate and uncontaminated data gathered from the correct people (Saunders et al., 2007).

For the purpose of this project, an online questionnaire is considered to be the most appropriate method of gathering the quantitative data required (see Appendix 9.4 for Questionnaire). This is with a view to gathering respondent profile information as well as pre-participation considerations of the respondents, and an overview of the key reasons and challenges facing participants when engaging in adult professional learning. An internet-mediated questionnaire has been selected for a number of reasons, but particularly because the target population are geographically dispersed, but have the advantage of all having internet access, thus making distribution of the questionnaire and the collation of the results quick and efficient.

The structure of the questionnaire and the question design is principally guided by the conceptual framework matrix and the need to gather key respondent profile information. The results of the questionnaire directly influence the nature of the follow up qualitative data gathering and analysis discussed in the following section. It is acknowledged that developing a questionnaire is complex and requires significant planning and testing to ensure validity, reliability and usability. It must provide a clear line of sight back to the research objectives and the conceptual framework matrix. In the context of this study it is also a useful tool to gather respondent profile information for a diverse sample and measurable attitudinal data through the use of standardised questions. The questionnaire was the starting point for the primary data collection within this linear study, which was then followed by qualitative data collection.

3.1.1.2 Qualitative Methods

For the purpose of this project, semi-structured, one to one interviews were considered to be the most appropriate method of gathering qualitative data, guided by the conceptual framework matrix and following on from the results of the questionnaire (see appendix 9.5 for interview structure). Whilst it is acknowledged that interviewing has its disadvantages - time consuming, complex and open to misinterpretation – for a number of reasons, this method fits with the linear data collection approach being adopted. Interviews can be used for a variety of purposes, but principally to gather new information and/or validate existing information. The data collected in this way can vary and includes factual information such as personal and demographic details, thoughts and feelings, perceptions and interpretations, as well as intentions and evaluations (Cameron and Price, 2009). Interviews, therefore, are conducted in order to discover 'those things that we cannot directly find and observe…the purpose of interviewing, then, is to allow us to enter into the other person's perspective' (Patton, 2002, p 341).

Interviews for the purpose of this project did not gather factual detail but were intended to allow sense-making to occur. A semi-structured format allowed for the exploration of factors generated during the questionnaire analysis, and for the generation of additional emergent themes. Qualitative data gathered during interviews was further supplemented by narrative data gathered from question 23 of the questionnaire. This combination of data allowed the factors generated from the questionnaire analysis to come to life and reveal the 'life-world' of the participants in order to understand their motivation and approach to participation in learning activities.

3.2.3 Summary of Research Design

Within this section a number of the key ontological and epistemological debates have been considered, leading to the emergence of an appropriate methodology fit for the purpose of this project and in line with the world views, beliefs, values and assumptions held within this study. The ontological approach of critical realism provides an appropriate mode of sense making that not only allows the management and educational researcher the capacity to *aim*

for a level of objectivity, but can also accomplish rich qualitative data collection in order to generate meaning and valuable insights into the experiences and opinions of the participants. This is achieved by the use of multiple and mixed methods and an axiological transparency that allows the reader autonomy over their judgement of the data and conclusions presented. A post-positivist epistemology supports this view, and allows the researcher to accept the benefits of both qualitative and quantitative methods and to triangulate data collected in order to draw *realistic* conclusions that are *probably true*.

A consideration of the epistemological and ontological approach taken within this study has aided the critical selection and justification of the chosen methodology, which provides a clear line of sight to the most appropriate methods of data collection congruent with this choice.

3.3 Research site

For the purposes of this study the research site was be a single, university-based, professionally accredited, taught, post-graduate degree programme (SCQF level 11) in Human Resource management (HRM), which is delivered over a period of two years. The research focused upon a sample derived from two cohorts of part time students matriculated on the programme. The programme is accredited by the Chartered Institute of Personnel and Development (CIPD), and is classified as an 'approved programme', whereby the curriculum is in line with the CIPD's professional standards. The programme has held accreditation since the early 1990s, and has gone through continuous development in line with the requirements of the Institute and with emerging professional and academic trends. The programme typically attracts individuals in the early stages of a career in human resource management, who combine study with work. The structure of the programme requires participants to attend formal classes and workshops one afternoon/evening per week during term time for two years. Participants can exit with a post-graduate diploma or a full Master's degree on completion of a dissertation. The philosophy of the programme is to facilitate the development of comprehensive knowledge and key professional competences in the field of HRM, enabling participants to make a significant contribution to HR practice.

Additional information regarding the CIPD can be found in appendix 9.6.

3.3.1 Target Population and Sampling Strategy

For the purpose of the questionnaire the target population was a 100% purposefully chosen group of all 68 active matriculated students on the part time MSc HRM programme at a university, at the point of data collection being undertaken (May to August, 2011). Following the completion of consent forms (see appendix 9.7), an initial survey sample of 55 students was generated. From this sample of 55 students there were 43 responses to the online questionnaire giving an overall response rate of 78% of those that gave consent, or 63% of the entire population. The initial consent form also requested volunteers for follow-up interviews, of which 49 agreed, and subsequently 7 individuals were chosen using non-probability convenience sampling. The final 7 interviewees were selected due to time availability and geographical location, representing 10% of the original target population. An element of quota sampling was adopted to ensure at least one male participant was included, as this reflected the overall target populations' gender split.

The questionnaire allowed for the collation of the demographic and occupational profile of those 43 questionnaire respondents and of the 7 interview participants.

3.3.2 Demographic Profile of Respondents

A demographic profile of the target population was generated by the questionnaire. It provides an overview of the sample population and supports the analysis and discussion of the conceptual framework matrix where relevant.

Respondents and interview participants were asked a number of demographic questions with the purpose of gathering a respondent/student profile. This includes questions relating to gender, age, children and dependants, ethnicity, place of residence and the highest level of education achieved by respondents prior to joining the Masters programme.

Of the questionnaire's 43 respondents, 90.3% were female and 9.7% were male. This is representative of the original target population.

As presented in figure 3.2, of the 43 respondents the age range was relatively wide with 9.3% (4) between the ages of 20 and 24. A large percentage, 46.5% (20), were in the 25 to 29 age bracket, with the figures subsequently tailing off with 23.3% (10) falling within the 30 – 34 group, 20.9% (9) aged between 35 and 39, and smaller numbers of over forties with 0% aged 40 to 44 and 4.6% (2) aged 45 to 49. There were no respondents over the age of 50 years old.

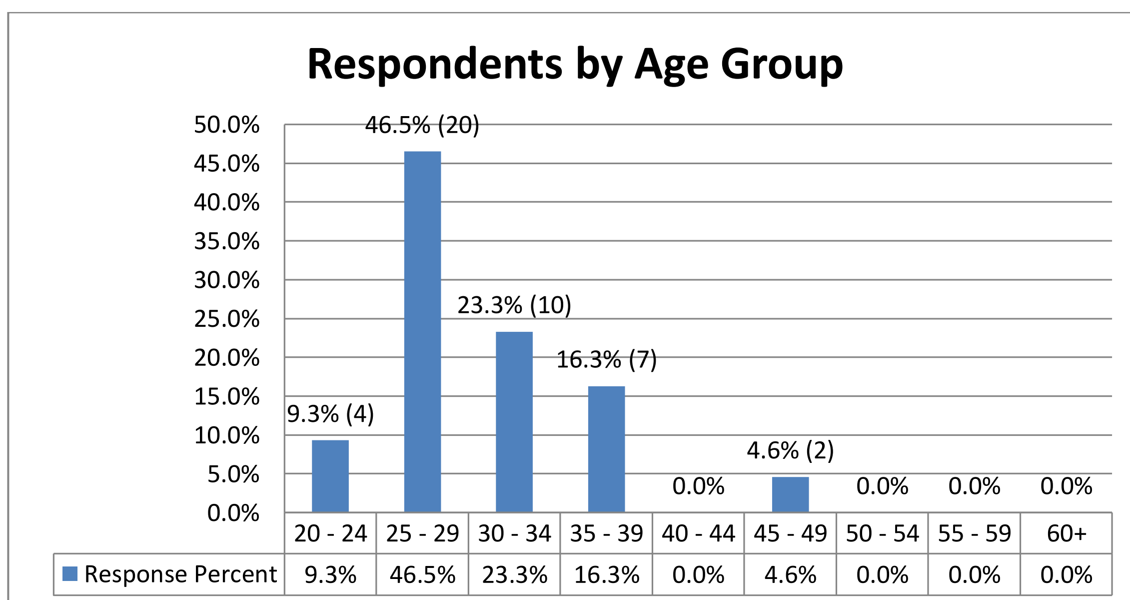

Figure 3-2: Respondents by Age Group

Respondents were asked to indicate if they had dependent children. From the 43 respondents, 29.9% (9) stated that they did have children, with the remaining 79.1% (34) stating that they did not.

Respondents were further requested to provide details of their ethnicity (presented in figure 3.3). This data revealed that the sample included individuals from only four of the stated options. The majority of respondents, 86% (37) were White British, 9.3% (4) were White (other white background), 2.3% (1) were White (Irish) and finally, 2.3%(1) were Mixed (White and Asian)

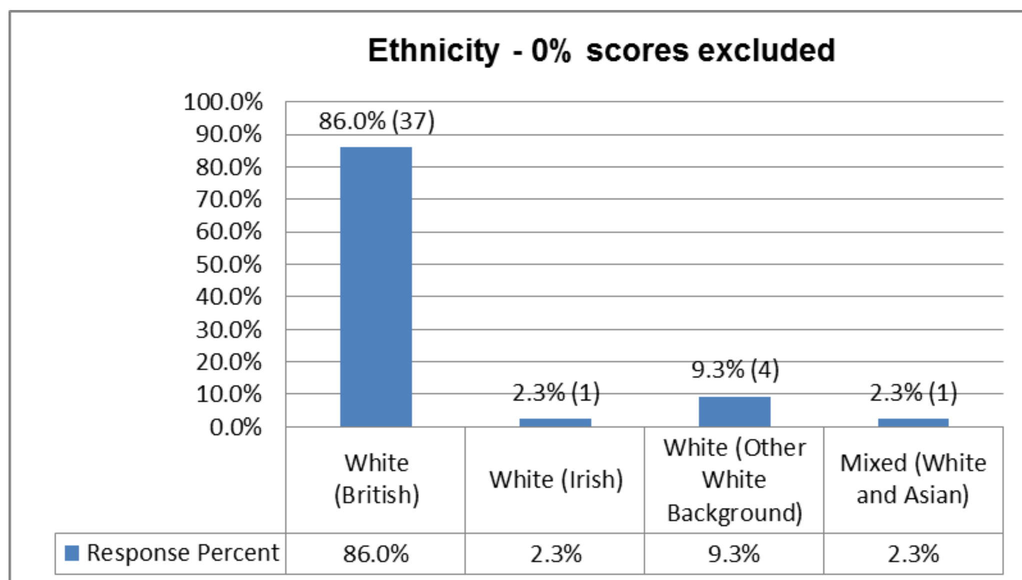

Figure 3-3: Respondents by Ethnicity

To reveal the 'catchment area' of the sample, respondents were asked to indicate where they lived (as presented in figure 3.4). A list of all recognised regions in Scotland was provided, and also the opportunity to indicate if primary residence was outside of Scotland. Of the 16 options, 9 were selected. It was found that 81% (35) respondents lived in the Lothian area: 55.8% (24) in the City of Edinburgh, 11.6% (5) in West Lothian, 9.3% (4) in Midlothian, and 4.7% (2) in East Lothian. The remaining options selected reveal a small number (6) of respondents living outside of the Lothian area.

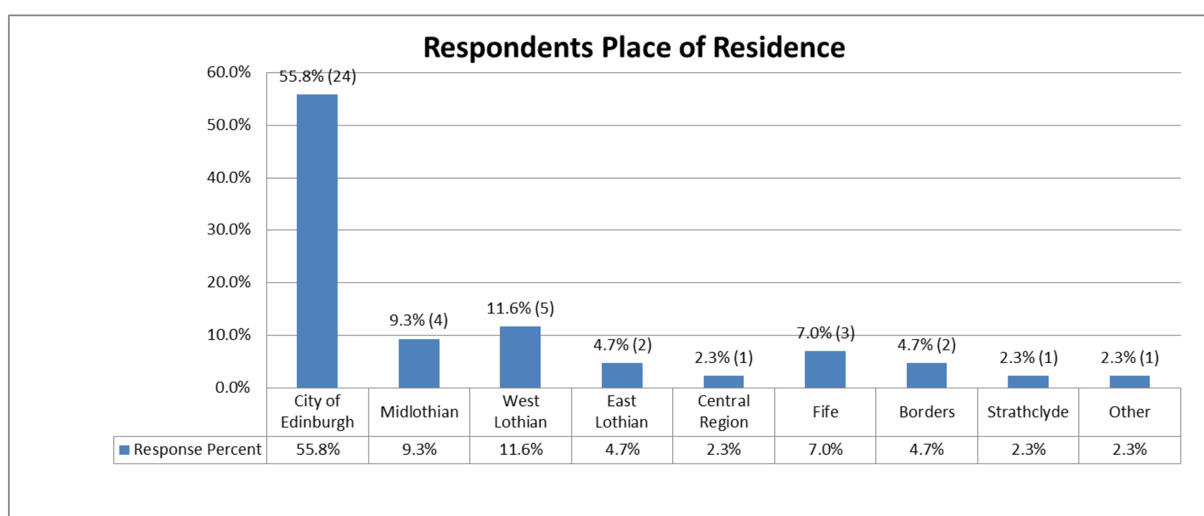

Figure 3-4: Respondents by Place of Residence

Due to the nature of this research, it was relevant to ask respondents to indicate their highest level of education, prior to commencing the Masters programme. A

significant percentage of respondents, 67.4% (29), indicated that they were qualified to degree level with 9.3% (4) holding ordinary degrees, 18.6% (8) holding non-business related honours degrees, and 39.5% (17) holding honours degrees in a business discipline. A further 4.7% (2) have a post-graduate qualification and 9.3% (4) have another professional qualification. The remaining 18.6% (8) hold qualifications lower than that of a degree, as illustrated in figure 3.5.

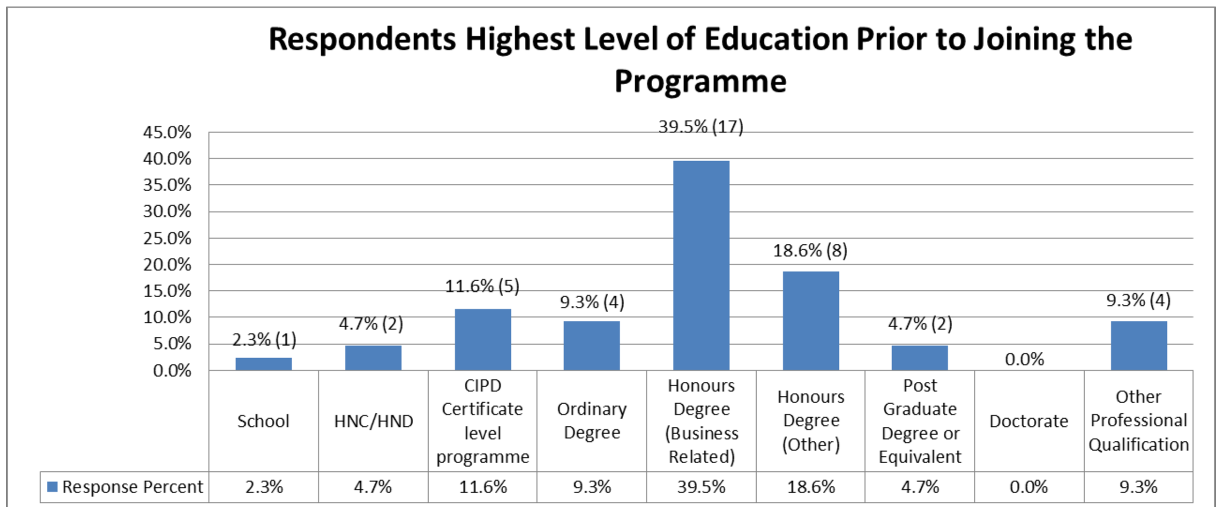

Figure 3-5: Respondents by Prior Level of Education

In brief, the demographic profile of the questionnaire respondents is that they are *predominantly* white, British females, aged between twenty and thirty-nine, without children or dependents, living in Lothian region and previously educated to degree level.

A demographic profile of the seven interview respondents is not included here in order to protect their anonymity. It was felt that providing demographic details of such a small number of individuals could lead to their identification, with particular reference to gender. As previously discussed, all interview respondents are derived from the questionnaire sample using non-probability, convenience sampling, with an element of quota sampling to ensure a representative gender split.

3.4 Questionnaire Procedure

The following section considers the questionnaire design process, pilot study, the necessity for respondent profile information and the selection and

justification of question styles (Bryman and Bell, 2003; Silverman, 2001). In addition it explores the administrative processes used and the subsequent analysis methods adopted.

3.4.1 Questionnaire Design

As previously outlined the sequence of primary data collection was linear. The first phase of data collection, the questionnaire, has enabled the collection of two tiers of data, that of descriptive data, including demographic, occupational and 'pre-participation considerations' profiles of respondents, and that of exploratory data, in the form of Likert scale questioning based on two of the three key areas within conceptual framework matrix, those of reasons and challenges. In addition, a broad open question was included with the intention of revealing real life situations and examples and providing an initial look at enablers to participation, a factor which would be explored in more detail during the qualitative research. The data collected partly fulfils objective two of this study, which then informed the development and analysis of the second phase of the research, that of semi-structured interviews. This process of triangulation of data sources was intended 'to obtain different but complementary data on the same topic' (Morse, 1991, p122).

Questions were carefully considered and designed to ensure the correct and appropriate data was collected, with reference to project objectives and the conceptual framework matrix. The questionnaire focused upon three types of data variables – opinions, behaviours and attributes (Saunders et al., 2007). The questionnaire predominantly contains closed questions in the form of likert scale ratings, list choices and category questions, and included one final open question (Bryman and Bell, 2003; Saunders et al, 2007). The style of language used within the questionnaire was carefully considered in the light of the relationship between the researcher and the participants (Cousin, 2009). Questions were deliberately informal, accessible and friendly.

The aim of this statistical element of the research was to inform the qualitative element of the study, rather than the statistics being the end point. The pilot study confirmed that the type and range of demographic and occupational data

questions included were satisfactory and useful. The harmonised Ethnic Group Output Classifications for Great Britain published by the Office for National Statistics (ONS) was used to construct the question on ethnic group (Economic and Social Data Service, 2012).

The two likert scale questions (Q21 Reasons and Q22 Challenges) each contain 40 items, which includes 10 items relating directly to each matrix dimension (professional, psychological, personal and practical). Questions were developed from the outcomes of objective number one, whereby a detailed review of the literature and similar studies in the area was undertaken and presented in chapter two of this thesis. Respondents were asked to indicate on a five point likert scale how strongly they agreed or disagreed with each statement relating to their reasons for participation (question 21) and the challenges they experienced (question 22). Please refer to table 3.1 overleaf which breaks down the 40 items by dimension, and appendix 9.4 for the complete questionnaire. The final open question was an invitation to share the respondents 'journey to participation' and was included to provide a discursive bridge to the data collected in the interviews.

The results of a number of questions contained in the questionnaire are not included in the final discussion, as they were no longer considered useful in contributing to the drawing of conclusions and the achievement of the specific research objectives. The results of two questions relating to participants 'pre-participation considerations' (Q19 + Q20) were deemed interesting but out with the boundaries of the immediate study. In addition, results from a number of the occupational profile questions proved not to be relevant in the final discussion due to a focus on the nature of participation rather than the specific professional background of the respondents.

	Psychological X 10 Items	Professional X10 Items	Practical X10 Items	Personal X 10 Items
Reasons: Question 21	To increase my self-esteem To improve my confidence levels To stimulate my brain As a means of expressing myself To gain respect from others For my own self-fulfilment, satisfaction and achievement I am competitive To prove my capabilities to others To develop my sense of Independence To get away from everyday life	To improve my employability and promotion opportunities To fulfil organisational objectives /required by my employer To improve my reward package To improve my credibility at work To improve my job security To improve my competence and professional awareness at work To reinforce knowledge gained on the job To gain a professional qualification To network with other professionals As a result of a significant work related event	I had recently moved to the area As a means of securing employment I was getting older I had the time to study I had nothing else to do I wanted to develop a routine The location of the campus I had no domestic commitments To improve my standard of living I had recently graduated and want to take the next step	For general interest/curiosity For my own personal development I had never attended university before To gain an academic qualification To gain recognition from others To improve my quality of life To build my social group For entertainment/leisure I was Influenced by my friends/family As a result of a significant life event
Challenges: Question 22	I Lacked confidence I had Low self-esteem I suffered from anxiety/nerves I had a fear of the unknown It felt like too much of a risk I did not feel ready to learn at post-graduate level I had a fear of rejection I had a fear of competition/competitiveness I doubted my own ability I was shy	My employer would not pay my fees My employer would not allow time away for attendance My employer would not allow time away for studying I had a lack of support from my Line Manager I had a lack of support from my colleagues The qualification would have no effect on my progress at work The qualification would have no effect on my rewards package at work As a result of a significant work related event I was not working in an HR related role My organisation did not support professional education	I found it difficult to arrange childcare There was a lack of funding to pay my tuition fees I found it difficult to get to the campus I had little free time to study There was a lack of information available on learning opportunities The content or structure of the programme did not meet my needs I had poor organisational skills I had domestic commitments I did not hold the standard entry requirements The application process put me off applying	I had a negative experience of education in the past My friends and family disapproved of the idea I did not have support from friends and family I felt too young/too old to study at this level I was not interested in the subject area of HRM I had not been involved in formal education for some time As a result of a significant life event I was not interested in studying My personal goals were not clear I had health problems

Table 3-1: Likert Scale Items (Qs 21 and 22) by Dimension

3.4.2 Pilot Study

A pilot study of the questionnaire was conducted, providing an opportunity to critically reflect on the categorisation of the questions and revise the content and administration of the survey instrument. The questionnaire was piloted with 28 respondents consisting of a year group of part time MSc HRM students who would not be included in the target population of the main study. Clarity of the instructions, understanding and interpretation of the questions and time taken to complete the questionnaire were all considered and one relevant, but minor, change was made, the inclusion of an aged 18+ category to question 4, 'age of children'. Further to this, the functionality of the software was tested during the pilot research with a view to enabling an organised and efficient approach to the collection and subsequent collation of responses.

3.4.3 Questionnaire Distribution and Administration

The final questionnaire was subsequently self-administered using online survey software (Survey monkey - SM) (Bryman and Bell, 2003). As part of the consent, participants were asked to provide a suitable contact email address of their choice. Emails containing the link to the questionnaire were personalised with the recipients' first name. One reminder email was sent three weeks after the original email, and a final email was sent when the questionnaire was closed to thank the respondents for their contribution to the research. The questionnaire was open to respondents for a total of five weeks.

This process allowed output of the questionnaire to be maximized within the limited timeframe, and the use of an online system facilitated the speedy collation of results into an appropriate format.

3.4.4 Quantitative Data Analysis and Interpretation

Questions contained within the questionnaire were principally concerned with asking the 'what' and 'why' questions and therefore did not require the instrument to supply data that could identify causality. Demographic data contained within the first part of the questionnaire was used to provide descriptive data in the form of participant profiles, as outlined in section 3.3.2.

The results of the Likert scale questions were subject to a principal component factor analysis, which ultimately informed the design and analysis of the interview structure in the second (qualitative) stage of the research. Further to this, it is acknowledged that the sample size is relatively small, and therefore assumptions were not made regarding the scale and distribution of the data (Cameron and Price, 2009; Kinnear and Grey, 2009).

Within the online survey system the collation of results is immediate, and basic descriptive data can be viewed instantly in the form of raw figures, graphs and charts. Following closure of the survey, all raw data collected from the closed questions was downloaded to the software package Excel and subsequently transferred to SPSS for numerical coding and analysis. Qualitative data collected from the open question contained in the questionnaire was downloaded to a word document and uploaded into NVIVO, the qualitative analysis software for coding and analysis, which is discussed in the following section (Edhlund, 2007). Each respondent was given a unique tag (source code) which was used in the master data spread sheet (Excel), within SPSS and also within NVIVO allowing names to be removed to ensure personal details were not duplicated or revealed.

Prior to detailed analysis being applied to the questionnaire the internal validity of the two principal likert scale questions was tested (Q21 and Q22). This calculates the average of all possible split-half, reliability coefficients. Bryman and Bell (2003) state that the computed alpha coefficient will vary between a perfect coefficient of 1 and a no internal validity score of 0. According to Field (2013), a score of 0.7 or above is considered to be an acceptable benchmark for ensuring internal validity. In the case of question 21 (reasons for participation) a Cronbach Alpha score of 0.855 was calculated for all 40 items and for question 22 (challenges to participation) a score of 0.935 was recorded for all 40 items. It can be concluded that both sets of questions and categories can be considered internally valid (Greasley, 2008). Further to this, each question was split into four sets of ten items that represent the four dimensions – Psychological, Personal, Professional and Practical. Scores can be seen in table 3.2. All appear to be acceptable, with the exception of ‘Practical Reasons’,

which achieved a reasonably low alpha score of 0.441 that rose to 0.541 after one of the items ('I recently moved to the area') was deleted.

Questionnaire Dimensions	Cronbach's Alpha Score
Reasons – All 40 items	0.855
Reasons – Psychological	0.764
Reasons – Personal	0.685
Reasons – Professional	0.636
Reasons – Practical	0.541
Challenges – All 40 items	0.935
Challenges – Psychological	0.898
Challenges – Personal	0.805
Challenges – Professional	0.855
Challenges – Practical	0.794

Table 3-2: Cronbach Alpha Scores (Qs 21 and 22)

In addition to this, the online software also allowed the likert scale questions (21 and 22) to be delivered in a randomised order to each recipient, with the intent of eliminating order bias and ensuring the validity of the question (Foddy, 1993).

Subsequently, univariate analysis was conducted to gather descriptive data regarding the respondent population for each variable and category within the data set (Greasley, 2008; Hardy and Bryman, 2004; Bryman and Bell, 2003). This simple approach allowed for the consideration of direct responses to each question and the drawing of initial conclusions on the results. To extract this data, frequency tables were generated by SPSS for each variable (question), excluding any open questions. Further to this, stacked bar charts were generated using Microsoft Excel to aid initial interpretation (as presented in appendix 9.8).

A principal components factor analysis with varimax rotation was then conducted on the two likert scale questions relating to reasons and challenges, in order to reveal the latent variables. Factor analysis is a statistical procedure used to identify a small number of factors (variables) that can be used to represent relationships among sets of inter-related variables. The analysis reveals the underlying factors, or latent variables, contained within a broader

construct, allowing the identification of otherwise not directly observable factors on the basis of a set of observable variables (Field, 2013). As described earlier, each question was broken into the four dimensions of the conceptual framework matrix – Professional, Psychological, Practical and Personal – with each containing ten items. The purpose of this process was to discover if certain groups of variables are driven by any underlying variables or components, and in the case of this research, variables which are relevant and apply to at least some of the respondents (Field, 2013). Once the principal component factor analysis had been conducted using SPSS software, the reduced sets of 'latent' variables were accepted when the factor loading was above 0.5. The content of each of the resulting factors was subsequently interpreted, and a descriptive label was attached to each factor using insight gained during the literature review. The resulting factors were subsequently added to the conceptual framework matrix within each of the twelve fields and used as an a priori coding framework for the narrative data.

There are potential weaknesses in using such statistical analysis techniques, such as the dangers of misinterpretation of questions or the purpose of the research. As previously stated, the purpose here is to gather descriptive data in order to inform the qualitative stage in the research sequence and emphasise the primacy of the subject matter rather than the method. Such information serves to provide an accurate representation of the sample in a summary format, and provides a starting point for a more detailed consideration of issues in the subsequent qualitative research. It allows us to begin to draw themes and patterns from the research.

3.5 Interview Procedure

Following closure of the online questionnaire, phase two of the primary data collection commenced. Semi-structured interviews were designed and administered using open ended questions derived from the literature review, from the resulting conceptual framework matrix and from the factors generated from the questionnaire analysis. The focus of the interviews was the further exploration of reasons and challenges, and to investigate the key enablers of

participation. Interviews were conducted with a view to fulfilling the remaining requirements of research objective two.

An interview guide was created which ensured a focused approach, yet allowed for probing questions to be included within individual interview scenarios (Appendix 9.5).

3.5.1 Interview Planning and Administration

As discussed in section 3.3 seven semi-structured interviews were carried out. Each participant was interviewed once and a face-to-face format was used in order to build rapport and to increase the confidence of the participant in terms of assurances of anonymity, confidentiality and accurate representation of the data collected. Further to this, one-to-one interviews allowed for the observation of non-verbal signals and behaviours and to seek clarification through probing questions (Farr and Timm, 1994).

Prior to commencing the interviews, one pilot interview was conducted with the purpose of testing and refining the interview approach and questions, and to develop the interview guide. The pilot study was particularly useful in testing the level of understanding of the interview questions and data from this pilot interview was not subsequently used in the analysis process. In addition to the interview guide, a brief overview of key themes was developed as a reminder during the interview. The guide was used only to jot down key words or notable body language, and as a means of recording post-interview reflections.

Interview requests were sent by email and contained a reminder of the research objectives and an overview of the topics the interview would cover. The option to refuse and withdraw from the research was given. At the start of all interviews a discussion was held regarding the recording of the interview and the security measures in place for storing the audio files. All participants consented to this and were comfortable with being recorded. The average length of each interview was forty-five minutes, and yielded an average count of 6935 words.

All seven interviews were recorded using a digital recorder and were subsequently transcribed verbatim for use in the analysis process, as outlined in

the following section. Prior to transcription, all interviews were reviewed and further initial notes taken. On completion of transcription, interviewees were sent their transcripts for approval and comment. All respondents approved their transcripts without change.

3.5.2 Qualitative Data Analysis and Interpretation

Narrative data collected from the final open question (Q23) within the questionnaire provided a discursive bridge between the quantitative data and the subsequent semi-structured interviews, and both sources of qualitative data were tackled using thematic analysis. This involved the systematic categorisation of data, guided by the conceptual framework matrix developed initially from the key literature, and enhanced by the results of the principal component factor analysis working as an 'a priori' replicable coding strategy applied across the two sources of qualitative data (Cameron and Price, 2009). This allowed each field within the matrix to be further explored and emergent themes to be extracted and consequently, well-reasoned conclusions to be drawn (Hardy and Bryman, 2004; Easton, 2009; Saunders et al, 2007; Cameron and Price, 2009). This process has determined the richness of the data and revealed a clearer picture of the politics, values, beliefs and culture influencing the sample – providing a lifewide view (Guba and Lincoln, 1990; 1994).

Qualitative data was analysed using Computer Aided Qualitative Data Analysis Software (CAQDAS), and the NVIVO software package was selected due to its extensive capabilities, including a large range of searching and reporting options (Edhlund, 2007). Further to this, the package affords the ability to manage large volumes of narrative material, and provides instant access to the data which can be searched, retrieved and interrogated within context (Saunders et al, 2007; Silverman, 2010). The use of a CAQDAS system provides a means to demonstrate rigour within the analysis process, by adopting reporting methods such as frequency analysis and the ability to interrogate all of the material through a coding system, rather than simply presenting anecdotes and vignettes (Silverman, 2010). As a result of combining these methods, typical examples of statements and quotations relating to the identified factors can be retrieved and their use supported and justified. This

further demonstrates the potential relationship between the quantitative and qualitative data that has been gathered and supports this study's' post-positivist stance.

The narrative data collected by the questionnaire and interviews were separated into individual response documents, known as 'internals' (primary data documents) and uploaded into NVIVO version 9. Following this, the process of coding began using the 'a priori' coding strategy whereby the identified factors (derived from the factor analysis) were used to assign units of meaning to the narrative data (Miles and Huberman, 1994). Three broad nodes were created in the CAQDAS system and relate to the three principal areas developed in the conceptual framework matrix – *reasons, challenges, enablers*, within each of these areas, four aggregated nodes were added to cover the key dimensions - *psychological, personal, professional* and *practical*. This structure is intended to mirror the conceptual framework matrix. Further to this, the latent variables (factors) generated during the quantitative analysis were added as (aggregated) nodes for 'reasons' and 'challenges'. All narrative data was subsequently coded against this framework, with 'enablers' generating its own emergent themes, guided only by the top two levels of the a priori framework. This led to the exploration of meaning within the matrix. Figure 3.6 demonstrates the coding structure entered in to the NVIVO package in the form of aggregated nodes.

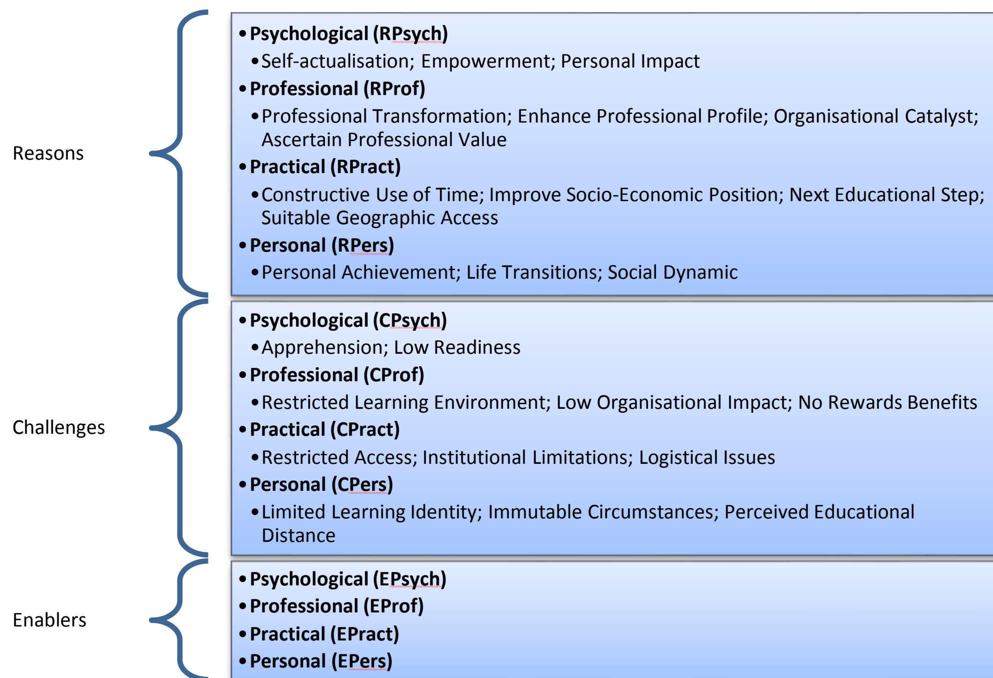

Figure 3-6: A Priori Coding Structure for NVIVO (Nodes)

The CAQDAS system also allowed for emergent themes to be generated, where relevant, in all areas during the analysis process. These themes are addressed in the following analysis and discussion chapters.

Potential weaknesses of using thematic analysis by means of a CAQDAS system is that the application of the coding system must be accurate otherwise the integrity of the research and subsequent conclusions may be compromised. It is also dependent on the quality of the data being analysed, as each response may be affected by a skewed understanding of the question, or a respondent's unwillingness or inability to articulate their beliefs and opinions. More generally, this approach to qualitative analysis is often accused of being too much of a compromise between the inferential statistics produced from more formal quantitative data and its analysis, and the richness of data garnered from more traditional methods of qualitative analysis, such as grounded theory (Cameron and Price, 2010)

Despite this debate, the qualitative element included in this research design has allowed for a more critical exploration of the subject, going beyond descriptive statistics to gain a deeper understanding of the meaning and nuances within the latent factors generated from the questionnaire. It has provided an opportunity

to begin to understand the meaning expressed through the words of the respondents themselves and to apply the conceptual framework matrix of the study in a more flexible manner.

3.6 Research Ethics

Because of the nature of this research project, it is important to outline the procedures followed in relation to ethical issues and concerns related to this research. Throughout the design and development of the project research instruments, four distinct areas of ethical concern, as presented by Diener and Crandall (1978), have been addressed. These concerns include the risk of harm to participants, a lack of informed consent, invasion of privacy and whether any deception may occur deliberately or inadvertently. To ensure these concerns are effectively abated, a number of proactive measures have been taken in accordance with both the University's Code of Ethics and the Economic and Social Research Council (ESRC) Research Ethics Framework. As a result, the appropriate measures were taken and are presented in the figure 3.7 (flow chart).

↓ Step 1: University ethics approval from the Faculty Research Ethics and Governance Committee (FREGC) ↓

Purpose: To meet ethical guidelines regarding the study of matriculated students within the research setting, particularly as the researcher is employed within the institution, and has been involved in teaching the target population.

↓ Step 2: Researcher presentation to target population outlining the purpose and potential outcomes of the research ↓

Purpose: To ensure informed consent is achieved. To encourage dialogue with participants; to reassure participants of the motives of the research and of anonymity and confidentiality; to outline the structure of the DBA programme; to outline the role of the researcher as a student within the context of the research; to outline the voluntary nature of participation; to informed the sample that they could withdraw their consent at any time and how to do so.

↓Step 3: Consent form distributed ↓

Purpose: To meet the requirements of the university code of research ethics. To provide evidence of informed consent. To ensure participants were aware of the purpose of the research and their role within it (Cousin, 2010). Appendix 9.9: Consent form

↓ Step 4: Ethics statement included in questionnaire/data encryption of results ↓

Purpose: To meet the requirements of the university code of research ethics. To reiterate ethical assurances previously provided. To ensure confidentiality and anonymity are maintained. Appendix 9.6: Copy of questionnaire

↓ Step 5: Respondents sent overview of questionnaire results ↓

Purpose: To ensure the participants' right to freedom and self-determination, therefore participants should maintain the right to view results and either refuse to take part or withdraw their input at any time (Cohen et al, 2007).

↓ Step 6: Renegotiate consent for interviews ↓

Purpose: To provide further assurances as to the voluntary nature of participation with no assumption were made regarding their on-going willingness to participate. An opportunity to provide a reminder of the topic and purpose of the research. correspondence

↓ Step 7: Interview respondents sent transcripts for approval/data encryption of results ↓

Purpose: To meet the requirements of the university code of research ethics. To ensure the accuracy of the data collected and to allow respondents the opportunity to change or delete their responses prior to analysis taking place. To ensure confidentiality and anonymity are maintained.

Step 8: All respondents assigned a unique source code as an identifier

Purpose: To ensure that anonymity and confidentiality are maintained. See section 3.7.2

Figure 3-7: Ethics Process

3.7 Data Presentation

3.7.1 Brief Clarification of Terminology

The data will be presented using the original conceptual framework. This organises the data in to the following areas and dimensions:

There are three key **areas** of interest within this study which form the left hand spine of the conceptual framework matrix. The three key **areas** of interest are Reasons, Challenges and Enablers.

There are four **dimensions** of interest which form the top line of the conceptual framework matrix. The four key dimensions of interest are Psychological, Professional, Practical and Personal.

Each of the two likert scale questions contained within the questionnaire instrument contain 40 **Items** in total, with each dimension being represented by 10 items within each question (Qs 21 +22)

The results of the integrated quantitative and qualitative analysis are referred to as **factors**, and are presented within the conceptual framework matrix.

The results which are derived from qualitative data only are referred to as **themes**, or as **emergent themes.**

3.7.2 Structure of Data Presentation

The following three chapters present the findings of the primary data analysis and an integrated critical discussion of these findings, and represents each of the three key areas from the conceptual framework matrix – reasons for participation (chapter 4), challenges to participation (chapter 5) and enablers for participation (chapter 6). These chapters fulfil research objectives 2 and 3:

…to investigate participants' perceptions of their reasons for participation in adult learning, the challenges they faced before and during participation and the enabling factors related to their participation.

…to trial the effectiveness of the conceptual framework of participation in adult learning as a tool to enable academics and institutions to enhance and improve participant support practice

Chapters four, five and six further contribute to the fulfilment of objective number 4:

…to present recommendations for improved practice within the research setting, and opportunities for the wider application of the framework

Within each chapter the four dimensions are explored in turn, and in chapters 5 and 6 both qualitative and quantitative results are presented in an integrated manner for each. Actual value results of questions 21 and 22 of the questionnaire are briefly outlined and presented in the form of stacked bar charts within appendix 9.8 (one per dimension – see table 3.1 for breakdown of items within each question). Results of the factor analysis of questions 21 and 22 of the questionnaire are presented in table format presented within the chapters, the resulting factors are discussed in turn and are brought to life using the qualitative data generated from thematic analysis of the interviews and the open question from the questionnaire and presented in the form of illustrative quotations. Chapter 6 draws upon qualitative data only, and presents themes developed from the thematic analysis of question 23 of the questionnaire and from the one-to-one interviews. For each of these three chapters quotations have been drawn from both the open question from the questionnaire and from the interviews. To ensure anonymity and confidentiality, participants were given a unique source code which is attached to each quotation. In the case of quotations contributed by questionnaire, respondents in question 23 of the questionnaire this ranges from QR 1 to QR 34 (QR = Questionnaire Respondent), and for interview respondents these are IVR 1 to IVR 7 (IVR = Interview Respondent).

Each of these chapters contains four main sections which relate directly to the four dimensions identified within the conceptual framework matrix. The first section in each chapter considers the psychological dimension – issues affecting or arising in the mind and therefore related to the mental and emotion

state of the adult learner; the second considers the professional dimension – issues related to, or connected, with the profession and/or job of the adult learner; the third looks at the practical dimension – issues concerned with the actual doing or use of something, and the final section in each chapter considers the personal dimension for participation – pertaining to issues affecting or belonging to the individual in question rather than to anyone else.

Each chapter ends with a summary of the results presented within the conceptual framework matrix, which is further developed through the identification of key factors, any further factors and any emergent themes that have arisen. This is supported by a brief discussion as to their implications. These key chapters are followed by the presentation of the complete conceptual framework matrix and a detailed set of considerations and conclusions, as well as a series of recommendations and outcomes pertaining to the research site.

4 REASONS FOR PARTICIPATION

4.1 Chapter Structure

This chapter explores the first key area of interest, that of reasons for participation in the learning activity, across the four identified dimensions. Data is presented from responses to question 21 of the questionnaire, from the qualitative data collated from question 23 of the questionnaire (Appendix 9.4) and from the one-to-one interviews (Appendix 9.5), as described in the previous chapter.

The ten statements relating to each dimension, as outlined previously in table 3.1 (40 in total), are contained within the factor analysis tables at the beginning of each principal section. These principal sections are structured around the four dimensions identified in the conceptual framework matrix, and developed through further factors derived from the analysis of the survey data. The factors to be explored within each dimension are as follows:

- **Psychological Dimension:** Self Actualisation, Empowerment and Personal Impact
- **Professional Dimension:** Professional Transformation, Enhancing Professional Profile, Organisational Catalyst, Ascertain Professional Value
- **Practical Dimension:** Constructive Use of Time, Improve Socio-Economic Position/Next Educational Step, Suitable Geographic Position
- **Personal Dimension:** Personal Achievement and Life Transitions and Social Dynamic.

4.2 The Psychological Dimension

Initial analysis of the basic percentage results of the psychological dimension within question 21 of the questionnaire, as illustrated in appendix 9.8.1 (stacked bar chart), reveals high levels of agreement for many of the psychological reasons proposed in the statements. Particularly notable is the high level of

agreement for ‘To improve my confidence levels’, ‘To stimulate my brain’, ‘For my own self-fulfilment’ and ‘To prove my capabilities to others’, indicating that psychological reasons for participation are significant for this group of participants. Lower levels of agreement can be seen for ‘As a means of expressing myself’, ‘I am competitive’ and to an even lower level ‘To get away from everyday life’, providing an initial indication that respondents are participating as a route to achieving a level of self-actualisation through empowerment.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items into three factors, as presented in table 4.1 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The three factors identified within this dimension are:

1. **Self-actualisation:** ‘The desire for personal fulfilment, to develop one’s potential, to become everything that one is capable of’ (p 268, Huczynski and Buchanan, 2010)

Factor derived from the following questionnaire items: For my own self-fulfilment & satisfaction; to improve my confidence levels and; to stimulate my brain

2. **Empowerment:** Whereby learning is means of improved self-understanding which allows individuals to discover solutions to problems or issues on their own terms (Schneider et al., 2001).

Factor derived from the following questionnaire items: To get away from everyday Life; to increase my self-esteem; I am competitive; to develop my sense of independence and; as a means of expressing myself.

3. **Personal Impact**: Whereby the individual is motivated to demonstrate and to prove their abilities to others.

Factor derived from the following questionnaire items: To prove my capabilities to others and; To gain respect from others

Rotated Component Matrix[a]			
Psychological Reasons	**Components**		
	Self Actualisation	**Empowerment**	**Personal Impact**
For my own self-fulfilment & satisfaction	.832		
To improve my confidence levels	.738	.319	
To stimulate my brain	.679		.307
To get away from everyday Life		.755	
To increase my self-esteem	.551	.677	
I am competitive		.604	.447
To develop my sense of independence		.594	
As a means of expressing myself		.581	
To prove my capabilities to others			.917
To gain respect from others	.600		.601
% variance explained	25.500	22.5	15.400
(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)			
a. Rotation converged in 7 iterations.			

Table 4-1: Factor Analysis Results – Psychological Reasons

As discussed in chapter 3 (section 3.5.2, figure 3.6) these factors were subsequently used as an a priori coding framework, as a means of exploring the narrative data. Within the narrative data there was clear agreement with these identified factors.

4.2.1 Self-Actualisation

Self-Actualisation was a clear and important psychological reason for participation in the programme, with interviewees suggesting that achieving self-fulfilment and personal satisfaction, as well as being a route to building confidence, were outcomes of real importance. This result supports the work of Boshier (1971), who proposes that such participants are demonstrating heterostatic participation behaviours as a means to achieving self-actualisation, and that participation in new and challenging learning activities serves to move them beyond their status quo.

Within the factor of *Self-Actualisation*, interview participants alluded to a desire to do something for themselves. This view supports that of Courtney (1992) in his view that the notion of learning represents a sense of freedom to choose, to be a consumer of educational products, and to have ownership over the decision to participate or not. Further to this, the cognitivist paradigm views

learning as an internal process, with the extent and depth of learning associated directly with the individuals' capacity and/or ability to process new experiences and information, the level of effort expended during the learning phenomenon, the depth of processing and where the new learning is placed within an existing knowledge structure. This view suggests that learning is a self-owned and managed journey (Jarvis, 2010; Huczynski and Buchanan, 2010), a view supported by the interview respondents, revealing a drive to participate for the benefit of themselves, with one respondent stating:

> *'…I think there must have been just a wee nudge in me sitting going come on, get on with your life, you need to do something…; […] I've got to do something for myself. And it was more for myself than anything else.' (IVR 7)*

This quote further demonstrates the strong psychological influences on the act of participation in learning. Building upon this, the key notions of self-fulfilment and satisfaction came through strongly from the participants, with the view that *self-actualisation* is aspirational. Miller (1967) suggests that such a driver to participation is generated as a result of a developing range of experiences and personal maturity as an individual reaches a reflective and reflexive stage of life. This suggestion is reflected in all of the interviews, with a strong sense that successful participation is about overcoming a challenge and gaining a feeling of fulfilment and satisfaction as a result, illustrated clearly in the following statement:

> *'I think it was the personal satisfaction of attaining something that I had never thought that I would ever achieve.' (IVR 7)*

Further to that, respondents viewed participation as a way of making up for past experiences that they felt had not been fulfilling or had not served to demonstrate their abilities accurately, as demonstrated here:

> *'I had some personal motivation to do the MSc over just the PG Dip as I don't think I particularly excelled myself in my first degree so felt that this*

was a chance to prove myself (although only really to myself, not anyone else)'. (QR 11)

Alongside this, the notion of self-actualisation was further supported by evidence which suggests that participating in the programme was also viewed as a way of building confidence in their ability to study and learn at that level, and to participate more effectively at work, a view which reflects the work of Houle (1961) and his 'Goal Orientation'. Individuals participate in learning for the achievement of established objectives developed following the realisation of a need or interest, whether these are practical and tangible or, in the case of the majority of the interview respondents, psychological and intangible in the form of a need to improve confidence. Respondents commented on the need to improve confidence in their work setting, as illustrated here:

> *'My reasons for wishing to do this were based on the lack of in house training and support from my immediate line manager (at the time), a lack of confidence in my own ability/knowledge and a desire to study HRM to enhance my career prospects internally/externally.' (QR 14)*

The need to aspire to, or achieve, *self-actualisation* as a reason for participation is apparent here, with the need to build confidence, self-fulfilment and satisfaction as the guiding factors influencing the journey. The evidence demonstrates that participation involves having a clear psychological goal that is meaningful only to the individual, and that drives the participant towards the learning journey.

4.2.2 Empowerment

The second factor to be identified within the psychological dimension was *empowerment,* supported by the notions of 'a desire to learn and develop' and 'a personal challenge' featuring within the narrative data, notions which complement the view of participation as a means of *self-actualisation*. Maslow (1943) and Rogers (1969) discussed adult learning and development in terms of actualisation and self-fulfilment achieved through an understanding and appreciation of subjective experience and personal values. In line with the

notion of ultimate *self-actualisation, empowerment* achieved through learning and development is considered an important reason for participation. It allows for the articulation of subjective experience and values as a means of self-understanding, and as a means of discovering solutions to problems or issues on the participants own terms, thereby empowering the individual (Schneider et al., 2001). Underpinning this view, interview respondents discussed their own desire to learn and develop and further to this, respondents noted the value of learning when its relevance and applicability to them as individuals was clear, a notion directly illustrated here:

> *'I did the CPP course offered by the College and loved being back studying, especially because I could see direct connections between my work and the course.' (QR 19)*

In addition, one participant noted that the value of the learning experience became more apparent as a result of participation in the programme, and whilst this may not have been a reason to participate in the first instance, it became a reason to continue and succeed.

> *'Whilst I commenced the course wanting to gain the qualification, I am surprised to find I am also really enjoying the learning experience.' (QR 26)*

Whilst this factor was not particularly strong within the narrative data analysis, the notion of a developing learning need or orientation is evident within the learning literature. Nonaka and Takeuchi (1995) define unarticulated mental models, whereby the learning need is not immediately apparent, and is revealed as a result of new experiences or contexts. In addition, Kolb (1984) proposes that learning occurs and knowledge is created through a transformation of experience. That experience may be the act of participation itself and the developing relationship and understanding between content and experience, therefore, a personal construction of meaning through experience (Armstrong, 2012).

Participation as a personal challenge was also a key element of *Empowerment*, and further reflects the goal orientation of the participants identified within the factor of *self-actualisation*. The notion of personal goal setting is strongly mirrored within many of the principal motivational orientation paradigms, including that of Houle (1961), who originally defined the goal oriented learner and subsequently Burgess (1971), who included 'personal goal' as a key element within his typology of participation. In addition, the notion of a personal challenge identified within this research can be found once again in the work of Boshier (1971) and his notion of growth motivation, whereby participants view the learning activity as a means of personal development beyond their normal activities, a reason for participation that was illustrated well by this quotation:

> *'It was through a growing involvement in these projects that I decided to seek a new challenge and gain a fuller understanding of HR.' (QR 22)*

This view demonstrates that a need for empowerment can influence the decision to participate in adult learning, with learning being viewed as a source of progression and growth following the realisation of learning and development needs.

4.2.3 Personal Impact

The third factor identified from the factor analysis was that of *Personal Impact* as a psychological reason for participation. The qualitative analysis supported this with evidence of personal drive and ambition and proving ones abilities to others, the latter being a departure from the previously identified notion of participating for the benefit of self, as illustrated by this quotation:

> *'I had always regretted not going to university when I was younger and wanted to prove to myself and others I was capable of achieving academic qualifications.' (QR 23)*

Inherent ambition was strongly indicated within the narrative data and reveals once again a very target and goal driven set of respondents, with evidence that participation in learning was a route to achieving specific targets, and in the case of this respondent, to progress a career:

'I've always been fairly ambitious, and wanted to progress my career, and recognised that in order to do that one of the prerequisites for applying externally, out-with this company, was the CIPD qualification.' (IVR 3)

This quote specifically demonstrates that there is strong support within the narrative data that *Improving Personal Impact* is a key reason for participation, a reason that features in the work of Havighurst (1973) and life cycle theory, whereby 'developmental tasks' or learning activities are often a result of a societal demand and a personal need that must be achieved in order that an individual can be judged, or judge themselves, as competent in a chosen skill, task or profession.

4.2.4 Key Points

The notions of achieving, or aspiring to, *self-actualisation*, *to be empowered* and to *enhance personal impact* is clearly supported in the literature and is accepted here as the key psychological reasons for participation in the identified learning activity (Boshier 1971; Courtney, 1992; Miller, 1967; Maslow, 1943; Rogers, 1969). Evidence suggests strong support for *self-actualisation* as a principal reason, one that is clearly reflected in the literature, yet is developed here through links with learning theory whereby it is suggested that the unique phenomenon of learning is an owned and managed journey which is aspirational and tied to personal goals (Jarvis, 2010; Huczynski and Buchanan, 2010). Further to this, the second central factor of *empowerment* is not explicitly outlined in the key participation theory, yet here it is an apparent extension of the notion of *self-actualisation*, with the suggestion that *empowerment* is an unarticulated reason that become apparent as involvement in the learning activity progresses (Schneider et al., 2001; Nonaka and Takeuchi, 1995). The factor of *empowerment* is once again in line with the growth motivation and goal orientation as outlined in the seminal literature (Houle, 1961; Burgess, 1971). This goal focus is again revealed within the factor of *personal impact,* which appears to be reinforced by a personal drive and ambition, guided by either a personal need or a societal demand (Havighurst, 1973). These factors therefore serve to articulate the notion of a goal orientation, which is strongly reflected in

the literature, and serves to define the previously broad application of this as a reason for participation.

4.3 The Professional Dimension

Initial analysis of the basic percentage results of the professional dimension within question 21 of the questionnaire, as illustrated in appendix 9.8.2 (stacked bar chart), demonstrates high levels of agreement for the majority of the professional reasons proposed in the questions. This indicates that participation in this particular learning activity was closely associated with work and the participants' professional life, with the exception of 'As a result of a significant work related event'.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items into four factors as presented in table 4.2 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The four factors identified within this dimension are:

1. **Professional Transformation:** Whereby the individual develops the skills and knowledge required to gain and improve professional standing and credibility

Factor derived from the following questionnaire items: To improve my competence and professional awareness; to improve my credibility at work; to reinforce Knowledge gained on the job and; to improve my job security

2. **Enhance Professional Profile:** Whereby individuals engage in activities that will that enhance their employability and rate of career progression.

Factor derived from the following questionnaire items: To gain a professional qualification and to improve my employability and promotion opportunities

3. **Organisational Catalyst:** Whereby the reason for participation originates from within the organisation.

Factor derived from the following questionnaire items: As a result of a significant work related event and to fulfil organisational objectives/required by employer.

4. **To Ascertain Professional Value:** Whereby individuals gain an understanding of their own professional worth and standing.

Factor derived from the following questionnaire items: To network with other professionals and to improve my reward package.

Rotated Component Matrix[a]

Professional Reasons	Components			
	Professional Transformation	Enhance Professional Profile	Organisational Catalyst	Ascertain Professional Value
To improve my competence and professional awareness	.778	.240	.116	-.267
To improve my credibility at work	.743	-.278	-.173	.243
To reinforce Knowledge gained on the job	.708	.064	.062	.065
To improve my job security	.524	.472	.222	.032
To gain a professional qualification	-.074	.901	.035	.073
To improve my employability and promotion opportunities	.432	.643	-.365	.243
As a result of a significant work related event	-.057	.052	.844	.269
To fulfill organisational objectives/Required by employer	.143	-.038	.791	.052
To network with other professionals	-.061	-.054	.197	.808
To improve my reward package	.141	.298	.089	.710
% Variance	21.700	16.800	16.100	14.300

(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)

a. Rotation converged in 7 iterations.

Table 4-2: Factor Analysis Results – Professional Reasons

As discussed in chapter 3 (section 3.5.2 + figure 3.6) these factors were subsequently used as an a priori coding framework as a means of exploring the narrative data. Within the narrative data there was clear agreement with these identified factors.

4.3.1 Professional Transformation

Professional Transformation was a clear and important professional reason for participation in the programme, with the building of skills and knowledge, gaining and improving professional credibility and general professional development being the key elements of this. Morstain and Smart (1974) include professional advancement as a distinct element within their six point typology,

suggesting that it could be, for some, the dominant motivational orientation to learn.

It is apparent that the development of skills and knowledge is a significant driver for participation in the programme, with interview respondents citing the value of building knowledge and skills to their career development and success, noting particularly the value such skills development will afford in their future careers:

> *'Although the qualification is not required by my current employer I am developing new skills which will hold me in good stead for the future.' (QR 16)*

This quotation further demonstrates an inherent readiness and enthusiasm to learn, a notion discussed extensively in the literature by Knowles (2011), Cropley (1980) and Radovan (2003). Radovan (2003) further suggests that such 'readiness' derives from apparent or emerging socio-cultural, psychological or professional needs, that drive individuals towards engaging in actions that fulfil or contribute towards achievement of goals or solution of a particular problem, now or in the future.

Building upon this, the narrative data provided a strong sense that by participating in the programme individuals seek to develop their professional credibility, with the following respondent using a previous positive learning experience to make the connection between having the qualification and the way in which they are viewed in the workplace:

> *'I decided to do the MSc course because I loved the subject and had enjoyed the CPP course. I also came to realise the connection between qualifications and credibility.' (QR 19)*

These notions of developing skills and knowledge, as well as gaining credibility, can also be seen in respondents' discussions of their own professional and personal development which highlights a keen awareness of a need to continuously develop to succeed within the profession. Again, Havighurst (1973) suggests that participation in learning relates to the need to fulfil a

‘developmental task’, and in this case in response to a perceived professional need that has the means to influence future career prospects.

> *‘In addition career development seemed limited and the University was about to embark on a period of significant restructure. With this in mind I decided that the time was right for me to spend time on my own professional development, and that I now had time in my personal life to begin the part-time MSc in HRM.’ (QR 26)*

This quote demonstrates that participants have taken ownership of their professional development with little reliance on being guided by their employers directly but rather are influenced by a need to set plans to ensure future professional security and success.

4.3.2 Enhancing Professional Profile

The notion of professional security is further developed within the factor of *Enhancing Professional Profile,* which was also identified as a factor and is once again strongly supported within the narrative data as being a key professional reason for participation. Within this there is evidence to suggest that enhancing employability and career progression are the key elements.

Enhancing employability appeared to be viewed by respondents as a fundamental outcome of participation in the programme in that it would lead to perceived higher levels of security and a more attractive employee brand, a motivational factor adopted by Morstain and Smart (1974), that of ‘professional advancement’, in their six factor model.

> *‘I wanted to ensure that I had the knowledge I would need to work in an HR environment, which would give me both job security and the flexibility to be able to work somewhere else in the future.’ (QR 7)*

This quote demonstrates a growing concern for not only ensuring that current ability is at an appropriate level, but also an awareness of the need to ‘future-proof’ their knowledge and skills in uncertain times.

It was also noted by some that the act of participation and involvement in the programme itself has a positive impact on employability even before final completion of the qualification:

‘I wanted to increase my HR knowledge to allow me to contribute more in the office and be more effective in my role. I also hoped that the increased knowledge would open doors and allow me to apply for jobs that I previously couldn’t, for example the ones that stated ‘CIPD qualified or working towards’. Such jobs tend to be better paid and this has been a big factor in commencing this course.’ (QR 1)

In line with this discussion of enhanced employability, respondents extensively discussed the benefits of participation in the programme for career progression and enhanced career trajectory. Respondents discussed the need for the qualification as a way of gaining promotion to the next role level. The occupational profile data collected in the questionnaire indicates that the majority (84%) of respondents were in non-managerial roles at the point of participation, indicating that an intended outcome of participation was to secure improved employment and promotional opportunities, and an implied sense that without it they would reach a ceiling in their career progression, as described here:

‘So really for me then it was about moving on because I’d had a couple of promotions and then it was like the next stage of promotion would require CIPD.’ (IVR 1)

Similarly to the discussion noted in section 4.3.1 regarding skills and knowledge development as means of future-proofing their career, there was further evidence of a consideration of the future in the need to secure the actual qualification now to ensure access to future opportunities:

‘So it wasn’t that it was a barrier at that stage because I wasn’t ready to apply for a higher level role then, I still didn’t have experience but thinking and planning ahead I would need to have that.’ (IVR 1)

This demonstrates significant levels of forward planning and a keen awareness of the importance of holding the qualification, and finds synergy with the literature relating to the value of continuous learning and development and its relationship with the economy, and particularly individual investment in continuous learning and skill building. The notion of participants engaging in learning to enhance their employability alludes to their role as active citizens of a learning society, whereby an improved professional profile can serve to improve the quality of life for the individual, and to ensure social integration as well as economic success (Coffield, 2000). It is important to remember, however, that not all participants are learning through choice, and organisational and societal pressures, such as the war for talent and the economic climate, directly and indirectly force individuals into up-skilling or acquiring new knowledge in order to compete for jobs and promotion, and thereby to gain security (Illeris, 2003a; 2003b).

4.3.3 Organisational Catalyst

An *Organisational Catalyst* and *To Ascertain Professional Value* were also identified as factors by the quantitative analysis, but evidence from the narrative data shows that these professional reasons, whilst evident, were not as strong as those previously identified.

In terms of participation due to an *Organisational Catalyst*, a number of respondents stated that it was simply a requirement of the organisation, with some implication that the requirement was in line with the achievement of organisational strategy:

> *'My manager believes that my development, and by doing the course, matches the requirements of the organisation as the plans for growth and sustainability continue.' (QR 19)*

> *'It was a requirement of my role to study for my CIPD qualification.' (QR 26)*

Participation in learning as a formal requirement, as demonstrated here, is reflected within key participation models, and particularly that of Burgess

(1971), who cites 'formal requirements' as one of his seven motivational orientations, as well as Morstain and Smart (1974) who consider 'external expectations' (complying with authority) as a principal motivating factor within their six factor typology. Further to this there was some suggestion that the requirement was viewed as a means of knowledge management within the function:

> *'Yeah, it was a development for me and I think my Head of HR was happy for me to do that, because it then meant it was someone else who had some knowledge of it as well.' (IVR 1)*

In developing this factor some respondents alluded to participation and its relationship with internal knowledge and capacity development, a view ultimately drawn from the need to enhance competitive advantage through the development of internal knowledge, skills and creativity (Rubenson, 2010a).

4.3.4 Ascertain Professional Value

The final factor within this section is that of *Ascertaining Professional Value* through networking opportunities and gaining an understanding of the profile of other HR professionals in order to benchmark one's self against them is supported, to an extent, within the qualitative data. One respondent noted the value of developing the network as a means of gaining access to future professional opportunities, a notion that can be linked to an enhancement of an individual's professional profile as highlighted in section 4.3.2.

> *'I was conscious that the experience I was gaining was good within the organisation, but it was within this sole organisation, I was keen to get a wider exposure to other HR professionals, and see how HR worked in other organisations, I suppose.' (IVR 3)*

This view represents the value of communities of practice, whereby groups of people within formal learning environments, such as this research site, can share experiences, thoughts, ideas and arguments in order to find solutions to problems, and make comparisons within their own professional environment (Merriam, 2010). Whilst this factor is limited in its representation in the narrative

data, it is suggested that perhaps it's presence within the factor analysis can be explained using Giddens (1979; 1986) notion of 'practical consciousness' whereby individuals may simply know and understand new skills and knowledge with little or no awareness of their source. Giddens suggests that it is often difficult to actualise knowledge gained discursively and pass the knowledge on – it is simply known. Such tacit knowledge may not have an identifiable source and is generally not the direct result of a targeted learning objective but can be equally as powerful in influencing their personal and professional development.

4.3.5 Key Points

The factors of *professional transformation, enhancing professional profile, organisational catalyst* and *to ascertain professional value* serve to elucidate on the broader, general theme highlighted in some of the previous literature, that of professional advancement. This research suggests that, depending on the nature of the learning activity, participation for professional reasons can be a significant driver. It is apparent here that participants have reached a stage of readiness to learn and to develop their skills and knowledge as a means of building their own professional capacity for the future (Knowles, 2011; Cropley, 1980; Radovan, 2003). The desire to e*nhance professional profiles* is strongly evidenced in the data and supports the notion of 'future-proofing' careers which is apparent throughout this professional dimension. This is supported by evidence to suggest that bolstering their own job security through an improved 'employee brand' and professional network is a means to enhancing future career progression, and to protect against hitting a professional 'ceiling'.

4.4 The Practical Dimension

Initial analysis of the basic percentage results of the practical dimension within question 21 of the questionnaire, as illustrated in appendix 9.8.3 (stacked bar chart), demonstrates reasonably high agreement for a number of the statements, in particular 'to improve my standard of living' and 'as a means of securing employment'. Some agreement can be seen with 'the location of the campus', 'I recently graduated and wanted to take the next step', 'I was getting older', 'I had no domestic commitments' and 'I had the time to study'. There is

significant disagreement with a number of the statements, particularly 'I had recently moved to the area', 'I had nothing else to do' and 'I wanted to develop a routine'. Such wide ranging levels of agreement for these statements demonstrate the unique practical challenges faced by individual participants within their unique set of circumstances.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items in to four factors, as presented in table 4.3 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The four factors identified within this dimension are:

1. **Constructive use of free time:** Whereby participation relates to the relative availability and use of the individuals time resources

Factor derived from the following questionnaire items: I had no domestic commitments; I had the time to study; I had nothing else to do and; I wanted to develop a routine

2. **Improve Socio-economic Position:** Whereby individuals choose to participate in order to improve their social and financial position.

Factor derived from the following questionnaire items: As a means of securing employment and; to improve my standard of living

3. **Next Educational Stage:** Whereby the learning activity is the next academic level up from previously achieved qualifications

Factor derived from the following questionnaire items: I recently graduated and wanted to take the next step

4. **Suitable Geographic Access:** Whereby the location of the learning activity is accessible and convenient to the individual

Factor derived from the following questionnaire items: The location of the campus and; I was getting older

Rotated Component Matrix[a]				
Practical Reasons	Components			
	Constructive Use of (Free) Time	Improve Socio-Economic Position	Next Educational Step	Suitable Geographic Access
I had no domestic commitments	.820	-.272	.043	.071
I had the time to study	.748	.030	-.261	.200
I had nothing else to do	.681	.351	.165	-.315
I wanted to develop a routine	.560	.099	.079	.228
As a means of securing employment	.059	.862	.131	.217
To improve my standard of living	-.041	.771	-.474	-.012
I recently graduated and wanted to take the next step	.001	-.019	.865	.069
The location of the campus	.224	.046	.213	.781
I was getting older	.040	.325	-.462	.643
% Variance	22.957	18.354	15.015	14.138

(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)

a. Rotation converged in 6 iterations.

Table 4-3: Factor Analysis Results – Practical Reasons

(Note: factor 'moved to the area' deleted to improve Alpha score)

As discussed in chapter 3 (section 3.5.2 + figure 3.6) these factors were subsequently used as an a priori coding framework as a means of exploring the narrative data. The narrative data does support these identified factors, to an extent, however there was limited discussion evident of practical reasons for participation in the interviews and open question (Q23).

4.4.1 Constructive Use of Time

The Constructive Use of Time relates to availability of time resources, personally and at work, and how these fitted with the demands and structure of the learning activity (Masters programme). Several respondents commented on the timing and structure of the programme as a positive factor for very different reasons, their ability to keep on top of the workload and employers willingness to support attendance, as illustrated in the following quotes:

> *'But also my preference actually was to do, having done a bit of research, was to do an in-house course like at the University, for two reasons, number one, the opportunity to interact with other HR professionals, and number two, the fact it's over a fixed period, I think that appealed to me, you know, because I could see a distance learning course would have the scope to slip.' (IVR 3)*

'...it was nearby [the campus] and the afternoon day release worked well with work. That was something they [employers] were willing to, had scope to do.' (IVR 6)

Further to this, one respondent stated that the structured programme allowed them to manage their time more effectively:

'…I quite liked the structured programme, because then, for me, planning ahead, I knew in advance where, you know, what I had to do, and every Monday I needed to be there, and, you know, I could schedule it all in, and with my job, the way it is, I have to be quite anal about stuff like that, because otherwise I just don't deliver.' (IVR 2)

The narrative data presents a reasonable volume of discussion on the value of structure and timing in relation to the decision to participate, yet the literature does not directly reflect this. Tight (2002) highlights that the practical implications of participation in learning activities, such as time, access, cost, and resources, are often missing from the normative literature, and in the case of participation in learning is often addressed in terms of being a barrier to participation, as discussed in the following chapter. Morstain and Smart (1965) allude to the time factor, but refer to 'spare time enjoyment' rather than the nature and structure of the learning activity being appropriate to the prevailing personal, practical and professional circumstances.

4.4.2 Improve Socio-Economic Position and Next Educational Step

Further to this, the factor analysis identified to *Improve Socio-Economic Position* as a factor. There was very limited specific discussion here, and it can be seen from sections 4.3.1 and 4.3.2 on Professional Reasons, that the related factors of employability and professional development appear more explicitly in the narrative data. Similarly, the identified variable of *Next Educational Step* is not reflected in the narrative data.

Whilst the narrative data relating to the factor *Next Educational Step* is not so apparent, literature does allude to this being a relevant reason for participation and can be seen, to an extent, in the goal oriented learner as defined by Houle

(1961), whereby participation in learning activities are a means of achieving qualifications and certification.

4.4.3 Suitable Geographic Position

The final factor identified within practical reasons for participation is that the university is in a *Suitable Geographic Position* to facilitate participation in the programme. The narrative data did support this factor with a number of respondents referring to the location of the campus being a factor in their choosing this programme as demonstrated here:

> *'The location was perfect for me, absolutely perfect.' (IVR 7)*
>
> *'I stay out in East Lothian, so, it, I know there are providers out-with Edinburgh, but they tended to be places that it wouldn't have been as convenient for me to commute to.' (IVR 3)*

There is no apparent literature which alludes to this as a significant reason for participation, it is therefore suggested that a suitable geographic position was simply a factor in choosing a service provider rather than a reason for participating at all. This may be due, however, to the city centre location of the University and the general catchment area for the programme. Results from the demographic profile information gathered from the questionnaire indicate that 81% of participants reside within the city or region where the programme provider is situated, and therefore convenience due to a suitable geographic position may be considered as an enabler to participation rather than an explicit reason.

4.4.4 Key Points

The factors of *constructive use of time* and *suitable geographic position* are clearly supported by the narrative data here, yet *to improve socio-economic position* and *next educational step* are limited in evidence. As discussed by Tight (2002) there is little consideration of the practical reasons for participation in the literature, and this research suggests that reasons are more fully embedded in the nature of the learning activity (in this case a professional

programme) and the individual's rationale for participation (personal and psychological factors). It appears that whilst the timing and structure of the programme and the location of the campus are discussed, they may be more explicitly discussed in terms of challenges to be overcome, or defined as enabling factors, rather than outlined as reasons for engaging in a learning activity in the first place.

The practical challenges facing participants, and the key enabling factors, are explored in the following two chapters, and the discussion returns to the point made above.

4.5 The Personal Dimension

Initial analysis of the basic percentage results of the personal dimension within question 21 of the questionnaire, as illustrated in appendix 9.8.4 (stacked bar chart), demonstrates a range of levels of agreement and disagreement. It can be seen that there is particularly high levels of agreement with three of the statements - 'For my own personal development', 'To gain an academic qualification' and 'To improve my quality of life'. Further to this, it must be noted that reasonably strong agreement can be seen for the statement 'To gain recognition from others'. There is significant disagreement with a number of the statements, particularly 'I had never been to university before', 'For entertainment/leisure' and 'As a result of a significant life event'.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items in to three factors, as presented in table 4.4 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The three factors identified within this dimension are:

1. **Personal Achievement:** Whereby individuals are driven to participate by a non-work related desire for a sense of achievement

Factor derived from the following questionnaire items: To gain an academic qualification; for my own personal development; for general interest/curiosity and; to gain recognition from others

2. **Life Transition:** Whereby an individual participates in the learning activity to facilitate a significant personal change.

Factor derived from the following questionnaire items: I had never attended university before and; as a result of a significant life event

3. **Social Dynamic:** whereby decisions to participate where guided by a social influence or need

Factor derived from the following questionnaire items: To build my social group and; I was influenced by my friends/Family

Rotated Component Matrix[a]

Personal Reasons	Components		
	Personal Achievement	Social Dynamic	Life transition
To gain an academic qualification	.793	-.053	.115
For my own personal development	.747	-.195	.007
For general interest/curiosity	.606	.329	.012
To gain recognition from others	.556	.490	.103
To build my social group	-.201	.790	-.108
I was influenced by my friends/Family	.090	.719	.037
To improve my quality of Life	.436	.469	.421
I had never attended university before	.118	-.031	.879
As a result of a significant life event	.183	.446	.543
For entertainment/Leisure	.329	.268	-.443
% Variance Explained	22.600	20.200	14.800

(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)

a. Rotation converged in 5 iterations.

Table 4-4: Factor Analysis Results – Personal Reasons

As discussed in chapter 3 (section 3.5.2 + Figure 3.6) these factors were subsequently used as an a priori coding framework as a means of exploring the narrative data. Within the narrative data there was clear agreement with these identified factors, and particularly with that of *personal achievement*.

4.5.1 Personal Achievement and Life Transitions

Personal Achievement was a distinct and central personal reason for participation in the programme, and within this factor there is further evidence of participants being goal driven, wanting to achieve an academic qualification,

and for personal (non-work related) learning and achievement, elements which can also be linked to the notions of empowerment and self-actualisation as discussed in section 4.2. There is an apparent overlap with the *life transitions* factor, in that both are concerned with the development and achievement of personal goals. According to Mezirow (1977; 1981), change or anomalies occur in someone's life that influence or generate a learning need. The learner must consider alternative ways of finding meaning and perspective, and begin or continue a learning cycle (Jarvis, 2010). Further to this, the idea of life transitions and the resulting development of goals can be seen in the work of Havighurst (1973) and life cycle theory, whereby an adult engages in 'developmental tasks' to aid a life transition. The following quote succinctly demonstrates this notion in that a new role leads to the respondent embracing the act of learning:

> *After then securing a full time position, I was encouraged to take the first steps via the College to undertake the CPP course. After which I was hungry to learn more.' (QR 33)*

In addition, such discussion of participation as significant personal step or achievement also reflects the work of Houle (1961) and his 'activity oriented learners', who participate for social and personal reasons; again, the work of Sheffield mirrors this in two of his motivational factors, that of a 'personal goal' and 'desire activity'; and that of the model presented by Burgess (1971) that highlights a 'personal goal' as key orientation to participation.

Further to this, the narrative data strongly suggests that participation in the programme is driven by the ultimate outcome of the programme, and that completion of the programme is viewed as a personal goal to be achieved, as can be seen here:

> *'I just couldn't give up. I'd set myself a goal and I wouldn't give up and I wanted to achieve it. That was unthinkable that I wouldn't have achieved it.' (IVR 5)*

Similarly, the narrative data suggests that beyond the achievement of a professional qualification, a number of respondents looked to participation in the programme as a means of gaining an academic qualification:

> *'…I had always regretted not going to university when I was younger and wanted to prove to myself and others I was capable of achieving academic qualifications. (QR 23)*

Such evidence of participants being goal driven is clear, and is evidenced across both psychological and personal dimensions, and further demonstrates the nature of participation in learning as being an owned and personal journey, whereby participants engage with learning principally for their own benefit (Jarvis, 2010).

4.5.2 Social Dynamic

The final factor identified by the analysis was that of the *Social Dynamic*, whereby decisions to participate were guided by a social influence or need, either to develop a social group or through the suggestions of friends and family. There is some qualitative evidence to support this, with respondents commenting on the desire to develop new friendships through participation in the learning activity, as illustrated here:

> *'…but the reason I chose the University, and the reason I chose the masters was, actually, I wanted to, a lot of my friends have moved on from uni, from under-grad uni, and they've moved all over the UK really, and I thought by doing a masters, part-time, and attending classes once a week I'd build up friendships there, and relationships with other people in the class, and network with other people' (IVR 2)*

This social dynamic is clearly reflected in the literature with some of the key participation models highlighting this as a significant factor in the reasons and motivation to participate, with Burgess (1971) citing 'to reach and social goal' and to take part in a social activity' as two of his seven orientations to participation, and Morstain and Smart (1974) highlighting 'social relationships' (to make friends) within his six factor typology of participation in learning.

4.5.3 Key Points

The factors of *personal achievement and life transitions* and *social dynamic* are strongly supported by the narrative data and again serve to expand on the more general labels afforded to such reasons in the participation literature (Mezirow, 1977; 1981; Havighurst, 1973; Houle, 1961; Burgess, 1971). Once again, there is evidence of respondents being goal driven, but with a focus on personal and social goals, with the impetus of life transitions driving the learning need and ultimate outcome of participation. It is apparent here that despite the nature of the learning activity in question, that of a professional qualification, there is strong evidence to suggest that such a personal goal is a significant factor in choosing to learn and is linked to, and supported by, the notion of self-actualisation and empowerment discussed in section 4.2 (Boshier 1971; Courtney, 1992; Miller, 1967; Maslow, 1943; Rogers, 1969). It can be concluded that participation in the learning activity in question is by no means purely professionally driven.

4.6 Presentation of Conceptual Framework Matrix: Reasons

Table 4.5 summarises the findings of the primary data analysis using factor analysis and thematic analysis. It highlights <u>all</u> factors identified as reasons for participation in the identified learning activity across the four dimensions, whilst drawing attention to the <u>key</u> factors which have been most notably evidenced in the narrative data, alongside any emergent themes arising.

Area of Interest	Dimension	Psychological Definition: Affecting or arising in the mind, related to the mental and emotion state of a person	Professional Definition: Related to, or connected, with a profession and/or job	Practical Definition: Concerned with the actual doing or use of something	Personal Definition: Affecting or belonging to a particular person rather than to anyone else
Reasons **(Definition: The cause, explanation, or justification for an action or event)**	Key Factor(s)	**Self-Actualisation** (self-fulfilment, personal satisfaction, build confidence) **Empowerment** (desire to learn and develop, personal challenge)	**Professional Transformation** (building skills and knowledge, gaining and improving credibility, general professional development) **Enhancing Professional Profile** (enhancing employability, career progression)	**Constructive Use of Time** (availability of time resources)	**Personal Achievement + Life Transition** (Goal driven, achieve academic qualification, personal learning and achievement, aid change)
	Further Factors	**Personal Impact** (drive and ambition, prove ones abilities to others)	**Organisational Catalyst** (Organisational requirement, gain competitive advantage) **Ascertain Professional Value** (networking opportunities, benchmarking)	**Improve Socio-Economic Position** (limited evidence) **Suitable Geographic Position** (limited evidence)	**Social Dynamic** (Social influence or need, develop social group)
	Emergent from narrative data			**Structure and Timing of the programme**	

Table 4-5: Summary of Key Factor in Matrix – Reasons for Participation

The psychological and personal dimensions reveal overlap in that they both show a strong and clear goal orientation which, it has been demonstrated, is deeply rooted in the participant's sense of self. Further to this, the professional dimension demonstrates that participation is inherently linked to participant's desire to build their own professional capacity in terms of skills and knowledge development, and an awareness of the need to 'future-proof' their careers. Finally, whilst there is limited evidence of practical reasons for participation, the key issue appears to be the timing and structure of the programme suiting personal and work commitments, an emergent theme not identified within the factor analysis, but it is suggested here that practical issues may appear more explicitly within the discussion of challenges to participation and enablers of participation, a notion which is explored further in the following two chapters.

The factors that have been generated here have links to not only the seminal participation literature, in that there is evidence of specific orientations to learning (goal driven, building capacity etc…), but also to learning theory in their strong connections with the act of learning being an owned and personally managed experience, rather than being an organisational or social imperative. This generates connections between disciplines that have not previously been made explicit. It extends the discussion of adult participation in learning, and through the use of the flexible conceptual framework matrix, affords the generation of a more specific picture and insight into participation in particular learning activities and reveals the relative strength of each dimension. In previous participation literature, many of the models focused on creating a set of generic ‘orientations’ to be applied to all adult learners, serving only to pigeon hole participants regardless of the nature of the learning activity itself.

5 CHALLENGES TO PARTICIPATION

5.1 Chapter Structure

This chapter continues the exploration of the conceptual framework matrix and follows the same structural outline as the previous chapter. This chapter explores the second key area of interest, challenges to participation in the learning activity, across the four identified dimensions. Data is presented from responses to question 22 of the questionnaire, from the qualitative data collated from question 23 of the questionnaire (see appendix 9.4) and from the one-to-one interviews (see appendix 9.5), as described in chapter 3.

As before, the ten statements relating to each dimension as outlined previously in table 3.1 (40 in total), are contained within the factor analysis results tables at the beginning of each principal section. These principal sections are structured around the four dimensions identified in the conceptual framework matrix, and developed through further factors derived from the analysis of the survey data. The factors to be explored within each dimension are as follows:

- Psychological Dimension: Apprehension; Low Readiness
- Professional Dimension: Restrictive Learning Environments; Low Organisational Impact; No Reward Benefit
- Practical Dimension: Restricted Access; Institutional Limitations; Logistical Issues
- Personal Dimension: Limited Learning Identify; Immutable (Personal) Circumstances; Work-Life Balance; Perceived Educational Distance

5.2 The Psychological Dimension

Initial analysis of the basic percentage results of the psychological dimension within question 22 of the questionnaire, as illustrated in appendix 9.8.5 (stacked bar chart), demonstrates that participants disagreed with the majority of the statements within the psychological dimension of challenges to participation. This indicates that psychological challenges were not prevalent before and

during participation in the programme. Some level of agreement can be seen, however, with ‘I had a fear of the unknown’ and I doubted my own ability’, and to a slightly lesser extent ‘I lacked confidence’ and ‘I suffered from anxiety/nerves’.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items in to two factors, as presented in table 5.1 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The two factors identified within this dimension are:

1. **Apprehension:** Displaying apprehension relates to participants having worry, concerns and/or anxieties regarding the prospect and/or act of participation.

Factor derived from the following questionnaire items: I suffered from anxiety/nerves; I had a fear of the unknown; It felt like too much of a risk; I was shy and; I had a fear of competition/competitiveness

2. **Low Readiness:** Low readiness to learn demonstrates low levels of confidence and self-esteem in relation to respondents’ perceived ability to actively and successfully participate in the learning activity (Knowles, 2011; Cropley, 1980; Radovan, 2003).

Factor derived from the following questionnaire items: I had a fear of rejection; I lacked confidence; I had low self-esteem; I doubted my own ability and, I did not feel ready to learn at PG level

Rotated Component Matrix[a]		
Psychological Challenges	Components	
	Apprehension	Low Readiness
I suffered from anxiety/nerves	.842	
I had a fear of the unknown	.801	
It felt like too much of a risk	.688	.384
I was shy	.645	.365
I had a fear of	.583	.438
I had a fear of rejection		.878
I lacked confidence		.765
I had low self-esteem	.458	.698
I doubted my own ability	.496	.658
I did not ready to learn at PG level	.358	.597
% Variance explained	32.200	31.600
(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser		
a. Rotation converged in 3 iterations.		

Table 5-1: Factor Analysis Results – Psychological Challenges

As discussed in chapter 3 (section 3.5.2 + Figure 3.6), these factors were subsequently used as an a priori coding framework, as a means of exploring the narrative data. The narrative data revealed the reality behind the psychological challenges explored in the questionnaire. Within the narrative data there was once again clear evidence of convergence with the identified factors of A*pprehension* and *Low Readiness*, and this revealed a close connection between them.

5.2.1 Apprehension and Low Readiness

The factors of *Apprehension* and *Low Readiness* are clearly demonstrated in the narrative data and investigation reveals that, in some areas, they are inextricably linked in both the literature and in the interview discussions.

The notion of readiness to learn and to participate was explored in the previous chapter in the work of Knowles (2011), Cropley (1980) and Radovan (2003), but related directly to readiness in terms of professional status and experience. It seems apparent that a number of respondents felt that a lack of readiness and their apprehension over joining the programme presented a challenge to effective participation. The factor of *Low Readiness* manifested itself in the narrative data as a lack of confidence, particularly in their ability to work and

succeed at masters level. This is supported directly by McGivney (1990), who cited a lack of confidence as one of the ten key barriers to participation. Respondents alluded to doubting their own ability to participate effectively and at an appropriate level, as illustrated by this quotation:

> *'Was I good enough for this? Was I an intellectual enough to do this, because you always doubt your capabilities?' (IVR 7)*

Relative to this was an apparent lack of awareness of what would be expected of respondents at post-graduate level. This reflects the cognitivist notion that the view an individual takes of the learning activity relates to their own capacity to process these new experiences, the level of effort they will require to participate effectively, and ultimately where the learning is positioned within their own knowledge structures and life-world (Piaget, 1928; Jarvis, 2010; Huczynski and Buchanan, 2010). This unique process is demonstrated in the following quotation where the individual makes assumptions based on previous learning experiences:

> *'Just thinking about it being a Master's more than anything and just thinking oh, it'll be much more difficult. But that was possibly more my ignorance of what a Master's would be as opposed to doing a degree, and plus I hadn't done the honours degree and I wouldn't have done a dissertation.' (IVR 5)*

This quotation illustrates the view of Bandura (1977; 1986), in that adult learners construct views through observation and experience, and that prevailing views and values influence their opinion of future learning experiences. Further to this, one interview respondent suggested a developing readiness derived from a previous learning experience, demonstrating an emergent view of the value of learning and the revelation of a previously unarticulated skill or ability, through a variety of learning interventions (Nonaka and Takeuchi, 1995; Giddens, 1979; 1986):

> *'The thought of attending University intimidated and frightened the life out of me. However after completing the CPP my confidence grew.' (Q17)*

'At the beginning, it completely overwhelmed me' (IVR 7)

These quotations demonstrate the unique notion of readiness and enthusiasm to learn, highlighting clear cross-over with the factor of *Apprehension* and a feeling of being overwhelmed. This complements the discussion in the previous chapter, highlighting that readiness is often emergent and is critically influenced at each stage by the individual's life-world, including prior learning experiences, their view of the value of learning and their prevailing confidence levels. This further confirms the earlier discussion that levels of 'readiness', whether low or high, derive from apparent or emerging socio-cultural, psychological or professional needs, yet are inextricably linked with the unique life-world of the participant.

The factor of *Low Readiness* is further related to the notion of *Apprehension* which, in the narrative data, appeared to focus on the early stages of participation rather than pre-participation concerns as demonstrated by *Low Readiness.* Further to a feeling of being overwhelmed by the prospect of participation, the factor of *Apprehension* was underpinned in the narrative data by participants alluding to worry and concern over taking time away from work to attend classes once the programme had commenced. With one respondent highlighting a perceived pressure from colleagues:

'…I suppose, when I was leaving at one o'clock or for half twelve, I felt like people in work were looking and saying; oh yeah, you've just got in and you're leaving. But, again, that was probably more me worrying about it because I'd just started a new job than actually people thinking anything of it.' (IVR 1)

Stress appeared to manifest itself following commencement of the programme rather than during the decision making process, where a consideration of levels of *Readiness* was a factor, with issues around balancing other personal and work commitments being particularly noted.

'I think I was particularly stressed out when I just started the programme in year one, I was doing the travel, I was working at Strathclyde so I was

doing all that travel, we'd also just bought a new house so I'm up until one o'clock in the morning stripping wallpaper, still trying to get up at five o'clock in the morning to get the train. (IVR 1)

This quotation alludes to the influence of work-life balance and the difficulties facing part time students juggling work, study and a personal life. This is further discussed later in this chapter in section 5.5.4.

5.2.2 Key Points

The analysis reveals clear links between the factors of *Low Readiness* and feelings of *Apprehension*, with *Low Readiness* revealing participants' lack of confidence in their abilities, and *Apprehension* demonstrating that this lack of confidence can often manifest itself in feelings of being overwhelmed and worried during the act of participation itself. Literature relating to readiness to learn is prevalent within the realms of learning theory and participation (Knowles, 2011; Cropley, 1980; Radovan, 2003), yet is not specifically identified in the key models of barriers and challenges to participation. McGivney (1990) identifies low confidence as a barrier to learning, but the remainder of the key models cite only the broad circumstances surrounding psychological challenges to participation in the form of dispositional barriers (Cross, 1981). This data therefore presents further insight in to the specific psychological challenges to participation in the context of the specific learning activity, with the analysis suggesting that psychological challenges are entirely unique to the individual, emerge during the journey towards participation and continue to adapt and develop as participants actively engage in the learning activity. The unique state of readiness appears to be directly influenced by levels of apprehension and the nature of this apprehension. It is apparent that levels of readiness and apprehension are, in turn, influenced by the source of the learning need (e.g.: taking time away from work to attend, perceived ability to study at that level etc...), who or what is driving the fulfilment of that need (e.g.: employer, self, social pressures etc…), and to the prior experience of learning held by the individual. It is therefore apparent that an understanding of how levels of readiness influence the individual's learning experience is essential in ensuring a positive, continuing learning journey.

5.3 The Professional Dimension

Initial analysis of the basic percentage results of the professional dimension within question 22 of the questionnaire, as illustrated in appendix 9.8.6 (stacked bar chart), suggests that once again there are relatively low levels of agreement with all statements relating to the professional challenges to participation, indicating that participants experience few challenges in terms of participation relating to their professional and general work-related circumstances. Some level of agreement can however be seen with 'The qualification would have no effect on my rewards package at work' and 'My employers would not pay my fees' and 'As a result of a significant work related event'.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items into three factors, as presented in table 5.2 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The three factors identified within this dimension are:

1. **Restrictive Learning Environments:** Features of the working environment that limit or prevent participation in learning activities, and which influence the extent to which the workplace as a whole creates barriers to learning (Fuller and Unwin, 2004)

Factor derived from the following questionnaire items: My employer would not allow time away for attendance; my organisation did not support professional education; my employer did not allow time away for studying; I had a lack of support from Line Manager; I had a lack of support from colleagues and; my employer would not pay my fees

2. **Low Organisational Impact:** Participation had little or nothing to do with current role, and would have little or no effect on participants' current role.

Factor derived from the following questionnaire items: As a result of a significant work related event; the qualification would have no effect on my progress at work and; I was not working in an HR related role

3. **No Reward Benefits**: Participation has no impact on reward and benefits package at work.

Factor derived from the following questionnaire items: The qualification would have no effect on my rewards package at work

Rotated Component Matrix[a]

Professional Challenges	Components		
	Restrictive learning environment	Low Organisational Impact	No Reward Benefits
My employer would not allow time away for attendance	.878	.208	-.051
My organisation did not support professional	.843	.194	.116
My employer did not allow time away for studying	.825	.016	.197
I had a lack of support from Line Manager	.780	.196	.163
I had a lack of support from colleagues	.748	.162	.389
My employer would not pay my fees	.664	.503	-.188
As a result of a significant work related event	.114	.809	-.098
The qualification would have no effect on my progress at work	.361	.663	.425
I was not working in an HR related role	.103	.580	.274
The qualification would have no effect on my rewards package at work	.136	.111	.920
% Variance	39.400	18.400	13.700

(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)

a. Rotation converged in 5 iterations.

Table 5-2: Factor Analysis Results – Professional Challenges

As discussed in chapter 3 (section 3.5.2 + Figure 3.6), these factors were subsequently used as an a priori coding framework as a means of exploring the narrative data. Within the narrative data there is evidence of convergence with two of these identified factors, that of *restrictive learning environment* and *Low Organisational Impact*. There was very little narrative data that supported *No Reward Benefits,* but it is suggested that with further research links between *Low Organisational Impact* and *No Reward Benefits* could be found.

5.3.1 Restrictive learning environments

Restrictive Learning Environments was a significant factor within the discussion of professional challenges, with the narrative data revealing strong evidence for particular issues, such as a lack of funding from the employer, no time off given for study or class attendance, and most prominently, a lack of general support

from employer (line managers) or colleagues. The notion of restrictive learning environments stems from the work of Fuller and Unwin (2004) and their expansive-restrictive continuum – a concept intended to illustrate the key features of differing learning environments. Discussion in the literature places learning environments on a continuum, and whilst not identifying specific 'restrictors', the model forms a useful lens by which to view the nature of organisational learning environments, or in the case of this learning activity, the professional environment supporting participation.

Restrictive elements outlined in the narrative data included a lack of funding from the employer and refers specifically to the payment of tuition fees, a practical consideration highlighted by Tight (2002), with a small number of respondents stated that this presented a particular challenge financially for them. This challenge was outlined in a number of different ways by respondents, including the need to postpone participation, that a lack of financial support was in fact offset by flexible working hours, and that self-funding could be seen as a demonstration of commitment to future employers. Therefore despite the financial challenges, respondents had elected to internalise this and focus on the individual opportunity, rather than the negative financial implications, as illustrated in this quotation:

> *'Although my employer does not support me and I am fully self-funding this can show to potential employers my commitment to my learning and my determination.' (QR 1)*

Respondents also alluded to the challenges of not being given paid leave for study and attendance, which further supports the factor of a *Restrictive Learning Environment.*

> *'The organisation has offered almost no help. They have not helped financially, they have given no exam or study leave and they didn't give me the time to attend lectures. It was 1-7 on a Tuesday and the Organisation took the money of my salary.' (IVR 4)*

This was a recurrent message within the narrative data with respondents revealing that they were required either to pay back time or take holidays to attend, further impacting on work-life balance and stress levels.

Further to this, the most significant element of the *Restrictive Learning Environment* factor revealed within the narrative data is that of a lack of general support for participation from employers (Line Managers) and colleagues, as highlighted here:

> *'…I'm only speaking from the perspective of the impression I get from some of my HR colleagues here, is that there, probably, is a lack of understanding as to necessarily the value that the course adds from an HR perspective.' (IVR 3)*

> *'…but there's always a sense that the job comes first. She doesn't really have that much interest. That came through when I was thinking about the dissertation, for the organisation she was more interested in how it would impact them, she just wanted to know how it would affect results there.' (IV 4)*

These quotations demonstrate a general lack of understanding of the mutual benefits of participation in such a learning activity to both the individual and the organisation or department as a whole. The benefits and value of an expansive learning environment is discussed in the following chapter.

5.3.2 Low Organisational Impact and No Reward Benefits

Low Organisational Impact was the second factor identified and was labelled as such, as participation was not seen to enhance or impact on organisational activities or the individuals' employability or professional development. A separate factor of *No Rewards Benefits* was identified during quantitative analysis, but is considered closely related to *Low Organisational Impact.* The narrative data demonstrated very limited support for these factors. Despite this, there was some evidence to suggest that professional challenges included the participants having limited access to an HR role, or limited HR experience to support participation, and participation having no impact on position or salary.

Limited access relates specifically to the respondents not being in an HR related role, or having difficulty getting an HR role, with the implication that this made participation in the programme more challenging due to the lack of direct HR experience. One respondent alluded to the lack of opportunities to move in to an HR role within their current organisation:

> *'…in my own organisation, because I'm uniformed and I'm in a box which is the Control Staff, for me to move over to HR is unheard of, for you to become uniformed. But I'm sure if there was an opportunity arose that I would maybe get interviewed or whatever, but there's no opportunities, absolutely none.' (IVR 5)*

Further to this the *No Reward Benefits* variable refers to participation having no impact on position or salary. There was no evidence of this as a challenge to participants within the narrative data, yet financial issues were raised in relation to the payment of course fees and is discussed in section 5.4 (Practical Challenges).

5.3.3 Key Points

The consideration of professional challenges provides a useful extension to the discussion of professional reasons presented in the previous chapter (section 4.3). The specific challenges have been defined as a result of this research and are not explicitly defined in participation literature, however, the literature relating to expansive-restrictive learning environments presented by Fuller and Unwin (2004) provides a useful lens by which to view these possible challenges to participation. It is apparent that a lack of organisational support in the form of limited or no time off for study and attendance, and a lack of general support from management and colleagues, are considered to be significant challenges when choosing to participate, and during the course of participation itself. The results further indicate little narrative support for the factors of *Low Organisational Impact* and *No Reward Benefits*, yet a lack of organisational funding is considered to be a challenge. This suggests that improved reward as a result of participation is not necessarily a driving factor for participation in the first place, a view which is further supported by this not being revealed as an

explicit reason for participation in the previous chapter. A lack of organisational funding, however, appears to lead to personal financial burden and the perception of poor support and organisational investment in professional learning opportunities. There is no evidence to suggest, however, that such challenges created any significant barriers, and the results suggest that the professional benefits to the individual that result from participation, as discussed in the previous chapter, such as enhanced credibility, career trajectory and progression and employability, provide enough motivation to continue and negate the relative strength of these challenges.

5.4 The Practical Dimension

Initial analysis of the basic percentage results of the practical dimension within question 22 of the questionnaire, as illustrated in appendix 9.8.7 (stacked bar chart), further indicates relatively low levels of agreement with the majority of the statements, indicating that practical challenges were not generally experienced by most of the participants. Some level of agreement can however be seen with 'I had little free time to study' and to a slightly lesser extent 'There was a lack of funding to pay my tuition fees' and 'I had domestic commitments' The remaining statements demonstrate very low levels of agreement.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items in to three factors, as presented in table 5.3 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The three factors identified within this dimension are:

1. **Restricted Access:** The practicalities of applying for, and gaining entry to the programme presented challenges to potential participants.

Factor derived from the following questionnaire items: The application process put me off applying; I had domestic commitments; there was a Lack of information on the learning opportunities; I did not hold the standard entry requirements and; I had little free time to study

2. **Institutional Limitations:** Issues related to the management and administration of the programme of study and to the institution itself.

Factor derived from the following questionnaire items: There was a lack of funding to pay my tuition fees and; The content or structure of the programme did not meet my needs

3. **Logistical Issues:** Challenges relating to time management and organisation.

Factor derived from the following questionnaire items: I found it difficult to arrange childcare and; I had poor organisational skills

Rotated Component Matrix[a]

Practical Challenges	Components		
	Restricted Access	Institutional Limitations	Logistical Issues
The application process put me off applying	.853	.327	-.039
I had domestic commitments	.760	.302	.213
There was a Lack of information on the learning opportunities	.703	.285	.087
I did not hold the standard entry requirements	.630	-.082	-.024
I had little free time to study	.609	.119	.478
There was a lack of funding to pay my tuition fees	.146	.860	-.033
The content or structure of the programme did not meet my needs	.349	.562	.361
I found it difficult to get to campus	.202	.488	.458
I found it difficult to arrange childcare	-.164	.184	.780
I had poor organisational skills	.412	-.370	.603
% Variance	29.500	17.600	16.000

(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)

a. Rotation converged in 7 iterations.

Table 5-3: Factor Analysis Results – Practical Challenges

As discussed in chapter 3 (section 3.5.2 + Figure 3.6) these factors were subsequently used as an a priori coding framework as a means of exploring the narrative data. Despite the bar chart demonstrating only minimal agreement with the statements, the narrative data does demonstrate evidence of convergence with the identified factor of *Restricted Access,* suggesting that this is an important issue for some of the respondents.

5.4.1 Restricted Access

The factor of *Restricted Access* was underpinned in the narrative data by participants alluding to issues about not having standard entry requirements to study at that level, and to an extent, the time pressures experienced by participants. As the analysis progressed, it became apparent that issues of time were a significant theme on their own. These emerged only from the narrative data, and whilst not necessarily a barrier or 'restriction', issues of work-life balance as the learning activity progressed were keenly felt. This emergent theme of work-life balance is therefore discussed in the following principal section within the Personal Dimension (section 5.5.3).

'Standard entry requirements' refers to those who did not hold typical entry qualifications such as a degree. Whilst this is referred to by only a small number of respondents (four), it is notable given the changing nature of adult and lifelong learning. Due to the varying agendas of lifelong learning, the learning society, and the inherent links between learning and the economy, adults are finding themselves engaging with learning activities at all stages of life, regardless of their previous educational level, in order to be active participants in the knowledge society (Jarvis, 2010). The specific challenge of not holding the standard entry requirements for participation in learning activity is discussed to an extent within the literature, with many studies alluding to the institutional barriers presented by Cross (1981), and particularly noting strict entry requirements as a major barrier to participation (Claus, 1986; Gallay and Hunter, 1979; Hengstler et al., 1984; Scanlan and Darkenwald, 1984).

The narrative data demonstrates the value of a 'bridging programme' for those with the relevant professional experience but, in this case no first degree, although undertaking the bridging programme presented some financial and time related challenges (see appendix 9.9 for details of the bridging programme). The data does, however, demonstrate a level of frustration at the programme entry requirements.

One respondent highlighted an initial frustration at the need to do a 'Bridging to Masters Programme', particularly because of the financial implications, but acknowledges the value of that initial learning experience:

'…then I wanted to do it [the masters], but I was informed by here [the University] that because I didn't have a degree and would have to do the Bridging programme. So, I thought right, OK, I have to do the Bridging [course], that was another £4000 or whatever, so I had to get money for that to pay for it, and that course, which I feel was invaluable looking back, because although I worked in HR I'm not an academic.' (IVR 4)

Similarly, one respondent highlighted their disappointment that work experience alone was not enough to gain entry to the programme:

'After achieving this with an overall merit (for the Certificate in Personnel Practice qualification), I decided to apply for the MSc in 2008, however after some issues with my application I found out that with 5 years recruitment experience and 5 years HR experience I didn't meet the entry criteria for the course. Whilst I was disappointed and upset by this, I undertook the bridging to masters course, which I managed to pass successfully.' (QR 34)

The evidence suggests that the challenge of restricted access appears limited to issues around entry requirements to the programme, and that whilst the need to complete the bridging programme was frustrating, it was in fact a key route to participation for some. This discussion is revisited in the following chapter – Enablers to Participation.

5.4.2 Institutional Limitations

The narrative data demonstrates some challenges relating to funding issues and the overall cost of the programme, and to an extent underpins the second factor of *Institutional Limitations*. Respondents suggest that it was in fact a lack of funding and financial support from employers rather than from the University (Institution) that was this issue for part time students, as discussed in section 5.3.1 – Restrictive Learning Environments.

5.4.3 Logistical Issues

The final factor of *Logistical Issues* relates to difficulties participants have in making suitable practical arrangements to be able to attend classes. Issues ranged from travelling distance to work-related travel. The narrative data does suggest, however, that time off from work for attendance was a more significant issue, as discussed in section 5.3.1 – Restrictive Learning Environments.

5.4.4 Key Points

Institutional Limitations and *Logistical Issues* were not significantly apparent and the data suggests that these were not real issues of concern for the sample. This result could be explained by the nature of this research, in that only active participants were included in the sample, therefore negating the level of impact such issues would have. It is suggested that a study of non-participants may reveal further insight in to these challenges or potential barriers to participation.

A consideration of the factor of *Restricted Access* provides an interesting insight into possible pressures on society becoming evident as a result of the developing knowledge economy (Borg and Mayo, 2005; Field, 2010). The nature of these participants, those engaging in part-time work related study, allows conclusions to be drawn as to the practical challenges facing adult learners today. Respondents alluded to the issue of not having the standard entry requirements for such a learning activity, yet did have a number of years relevant work experience. A number of key authors cite strict standard entry qualifications as potential barrier to participation, but provide little background as to why entry requirements are problematic for some and perhaps not others (Claus, 1986; Gallay and Hunter, 1979; Hengstler et al., 1984; Scanlan and Darkenwald, 1984). The deeper exploration of this previously cited theme provides useful insight in to the specifics of this key issue. This data, along with the nature of the participants, could suggest that these adults are feeling the effects of the drive for lifelong learning and the need to find a place as an active citizen within a learning society and a knowledge economy (Hayes et al. 1995). Where previously they have not needed to engage in such learning activities or gain qualifications, they now find themselves in a position where, in order to compete or progress within their chosen field, they must now gain higher level

qualifications. They find themselves without the standard entry requirements and, in this case, experience the challenge of engaging in an access programme at considerable time and expense.

5.5 The Personal Dimension

Initial analysis of the basic percentage results of the personal dimension within question 22 of the questionnaire, as illustrated in appendix 9.8.8 (stacked bar chart), indicates again that there are very low levels of agreement with all of the statements. This suggests that participants experienced few personal challenges when choosing to participate and during the act of participation, with the exception of 'I had not been involved in formal education for some time', where there is a notable level of agreement although still not from a majority.

This group of questions was then subject to factor analysis (as described in section 3.4.4), which grouped the items in to three factors, as presented in table 5.4 (see shaded groupings). Informed by the literature, each grouping was subsequently interpreted and a descriptive label was given. The three factors identified within this dimension are:

1. **Limited Learning Identity:** Displaying a *Limited Learning Identity* suggests that such participants do not perceive themselves as active learners per se, they are not inclined to seek or engage in life experiences with a learning attitude, and have a restricted or non-existent belief in their ability to learn (Kolb and Kolb, 2009).

Factor derived from the following questionnaire items: I did not have support from friends and family; I was not interested in subject area of HRM; my friends and family disapproved of the idea and; my personal goals were not clear

2. **Perceived Educational Distance:** Whereby participants do not perceive themselves as suitable candidates for participation.

Factor derived from the following questionnaire items: I felt too young/too old to study at this level; I was not interested in studying and; I had not been involved in formal education for some time.

3. **Immutable (Personal) Circumstances:** Personal circumstances or events affecting participation in learning that are out-with the control or influence of the participant.

Factor derived from the following questionnaire items: As a result of a significant life event; I had a negative experience of education in the past and; I had health problems.

Rotated Component Matrix[a]

Personal Challenges	Components		
	Limited Learning Identity	Immutable (Personal) Circumstances	Perceived Education Distance
I did not have support from friends and family	.874	.194	.070
I was not interested in subject area of HRM	.828	.008	.114
My friends and family disapproved of the idea	.780	.207	.259
My personal goals were not clear	.544	.139	.238
As a result of a significant life event	.287	.793	-.039
I had a negative experience of education in the past	.361	.734	.160
I had health problems	-.080	.687	.278
I felt too young/too old to study at this level	.342	.001	.823
I was not interested in studying	.469	.151	.736
I had not been involved in formal education for some time	-.045	.376	.592
% Variance Explained	29.100	19.000	18.100

(Extraction Method: Principal Component Analysis. Rotation Method: Varimax with Kaiser Normalization.)

a. Rotation converged in 6 iterations.

Table 5-4: Factor Analysis Results – Personal Challenges

As discussed in chapter 3 (section 3.5.2 + Figure 3.6) these factors were subsequently used as an a priori coding framework as a means of exploring the narrative data. Within the narrative data there is limited evidence of convergence with the identified factors and a notable additional theme of *Work-Life Balance*.

5.5.1 Limited Learning Identity and Perceived Educational Distance

The factor of *Limited Learning Identity* suggests a weak personal association with the act of participation in an organised learning activity, suggesting little interest in or a limited social relationship with the act. Similarly, *Perceived Educational Distance* suggests participants do not perceive themselves as suitable candidates for participation because of issues such as age, length of time since their last educational experience, or simply a lack of interest in participation. Both factors suggest subjective personal challenges that are personally or socially constructed. No supporting evidence was found in the

narrative data for either of these linked factors. The lack of narrative data may simply reflect the notion of this subjective view of the relative outcomes and rewards of participation, as suggested by Jonsson and Gahler (1996 in Rubenson 2010b), and that whilst factor analysis suggests this as an important issue for some, the interview respondents did not articulate a *Limited Learning Identity* and *Perceived Educational Distance* as specific issues for them. This suggests that these challenges relate only to a minority of participants. Dispositional barriers of this nature appear more often in studies of non-participants, and as this study focuses on active participants only, this could suggest that an apparent motivation to study and learn in participants is a valid reason not to explore such barriers or challenges, or to expect their existence.

5.5.2 Immutable Personal Circumstances

The factor of *Immutable Personal Circumstances* refers to personal challenges to participation out-with the control or influence of the participant, such as significant life events or health related issues. This factor was underpinned, to an extent, in the narrative data by a small number of participants alluding to issues around significant life events that presented as a challenge to on-going participation, such as getting married, moving house and specific family issues, and reflects the situational barriers outlined by a number of the key authors in their studies of non-participants (Johnstone and Rivera, 1965; Cross, 1981). Crucially, these circumstances have not prevented participation in these cases, but reflect the uncertain and uncontrollable events that can influence the participants learning experience.

An interview respondent cited the significant life event of planning a wedding and getting married as influencing the nature of their experience, simply suggesting a busier and less organised lifestyle for the duration:

> *'I know, and I think I was also mid planning the wedding as well, so it was all just a bit chaotic.' (IVR 1)*

Further to this, one questionnaire respondent alluded to the layers of challenges they experienced during participation, including those that were a direct result of their decision to participate as well as uncontrollable family issues:

'The MSc has been particularly challenging not just because I feel I am not a particularly academically minded individual but also because I have worked full time, self-fund my MSc and I have also encountered complex family issues in the past year.' (QR 15)

The challenge of such circumstances, is not reported in the narrative data to any significant extent, however, because of the unpredictable nature of such events, it is important to consider them and be aware of them. The situational issues cited in the existing literature (Cross, 1981; Johnstone and Rivera, 1965; McGivney, 1990; Sargant et al. 1997; Beinart and Smith, 1998) allude to barriers such as financial constraints, childcare issues etc… yet identifying such specific issues, whilst useful, obfuscates a real understanding and awareness of the wide range of immutable personal challenges an individual may face during participation, and the degree to which this will affect each individual will be unique for each participant.

5.5.3 Work-Life Balance

The theme of *Work-Life Balance*, which Felstead et al (2002, p 56) define as 'the relationship between the institutional and cultural times and spaces of work and non-work in societies where income is predominantly generated and distributed through labour markets', did not feature in the factor analysis and has emerged from the narrative data, was discussed in some form by all of the interview respondents. This theme provides a useful means of viewing the balancing act many of the part time students have to manage whilst participating in the programme. Whilst this theme has emerged within the Personal Challenges factor, there is a clear connection with all identified challenges across the conceptual framework matrix. This theme encompasses many of the key challenges already considered, but notably reveals concerns and challenges relating to the impact participation would have on family and relationships, for example:

'I suppose, the thing that worried me, or concerned me the most, was work-life balance...Would I ever get to see my family? Would I ever get home to see my friends?' (IVR 2)

Most notably, the narrative data reveals significant challenges relating to time pressures on participants during the programme, and the difficulties this caused in trying to maintain a work-life balance. As would be expected, discussion of time pressure as a distinct challenge is prevalent in the literature and evidenced in some of the key large scale surveys of adult participation in learning, most recently in the National Adult Learning Survey (2010). One interviewee alluded to the commitment to the learning activity unexpectedly impinging on their personal time

> *'I didn't have a realistic perception of the amount of time in advance, I don't think…about how much of my personal time it would take up. It has, on occasion, pushed it to the limit in terms of the amount of personal time I've had to use.' (IVR 3)*

Much of the literature focuses on a lack of time to study as a barrier to participation (CEDEFOB, 2003; OECD, 2000; Carp et al., 1974; Scanlan and Darkenwald, 1984 both in Henry and Basile, 1994; McGivney, 1990). Within this study, looking at active participants only, the narrative data suggests that participants underestimated the amount of time they would need to commit to the course prior to joining, and only realised the extent of the commitment in the early stages of participation. One interviewee referenced the need to work full time alongside participating in the two year programme and the challenge that this particular situation unexpectedly presented:

> *'I think I was probably just going in a bit naive and a bit blind thinking; oh well, I've just done my undergrad degree so I'll be fine, and not really anticipating; well, you actually have to work full time along with doing this. So I think I was pretty naive as to the time commitment that would be needed.' (IVR 1)*

Further to this, interview respondents commented on the need to manage their changing professional life alongside their own personal priorities, as illustrated in the following quotations:

'The main challenges encountered have been the need to balance multiple priorities, with a recent promotion at work alongside a busy personal life.' (QR 16)

'Whilst there have been some highs and lows whilst studying, mainly around fitting in my university commitments around holding down a very busy job as well as trying to retain some element of a social life.' (QR 34)

The key message from the respondents appears to be a lack of awareness and preparedness for the amount of time the learning activity would take up, and the general level of commitment required, leading to anxieties over friendships, relationships and the effect on their working lives.

5.5.4 Key Points

The consideration of personal challenges to participation has revealed scant supporting evidence for participants with a *Limited Learning Identity* or *Perceived Educational Distance* engaged with this specific learning activity. The discussion suggests, however, that such challenges are wholly subjective and are unique to each participant, thereby rendering it a problematic factor to contextualise and specify. Again, it is proposed that the very nature of the sample, that of active participants, may render this factor less relevant here but may be found to be significant in other studies. Similarly, the factor of *Immutable Personal Circumstances* garnered limited supporting evidence in the narrative data, yet revealed some insight into the potential for all participants to experience uncontrolled or unexpected personal events that, in this instance, may impact on their ability to successfully participate in the learning activity. A lack of narrative data does not lead to the conclusion that this is not a potential challenge.

Significantly the emergent theme of *Work-Life Balance* reveals an over-arching challenge for those participants engaged in a learning activity of this nature whilst working full time. The theme reveals the balancing act that participants often have to face, including maintaining relationships, handling the heavier than expected workload, and most notably, the time pressures they faced.

Whilst work-life balance is a well explored topic it does not explicitly feature in the general and seminal participation literature. This literature does, however, note time pressures as a significant barrier or challenge to participation, (Johnstone and Rivera, 1965; Charnley et al. 1980 cited in Jarvis, 2010; McGivney, 1990; Sargant et al. 1997). The inclusion of work-life balance as a key theme is not necessarily limited to the study of those undertaking learning activities related to their job, and can be connected to the discussion in the previous chapter on reasons for participation. Whilst achieving work-life balance may present a challenge, it may also be the reason for participation in the first place, if a principal driver is to seek self-actualisation, empowerment or develop social connections beyond that of the workplace or current social circle. This theme usefully extends the seminal literature and provides evidence of the careful balance and potential overlap between reasons for participation and the potential challenges to be faced.

5.6 Presentation of Conceptual Framework Matrix: Challenges

Table 5.5 summarises the findings of the primary data analysis using factor analysis and thematic analysis. It highlights all factors identified as challenges to participation in the identified learning activity across the four dimensions, whilst drawing attention to the key factors which have been most notably evidenced in the narrative data, and any further emergent themes arising.

Area of Interest	Dimension	**Psychological** Definition: Affecting or arising in the mind, related to the mental and emotion state of a person	**Professional** Definition: Related to, or connected, with a profession and/or job	**Practical** Definition: Concerned with the actual doing or use of something	**Personal** Definition: Affecting or belonging to a particular person rather than to anyone else
Challenges **(Definition: A test of one's resources or abilities in a demanding but stimulating undertaking)**	**Key Factor(s)**	**Apprehension** (Worry, anxiety, stress) **Low Readiness** (Lack of confidence, Ability to work at Masters level)	**Restrictive Learning Environments** (Lack of employer funding, no time off for attendance/study, lack of general support from employers/colleagues)		
	Further Factors		**Low Organisational Impact** (Low impact on employability/professional development, Limited access to HR role/experience to support participation) **No Rewards Benefits** (No impact on position or salary)	**Restricted Access** (Did not hold standard entry requirements, academic level, time pressures) **Institutional Limitations** (Lack of funding) **Logistical Issues** (Difficulties in making suitable arrangements to attend, lack of time of for attendance)	**Limited Learning Identity** **Immutable Personal Circumstances** (significant life event) **Perceived Educational Distance**
	Emergent from narrative data				**Work-Life Balance** (Impact of family and relationships)

Table 5-5: Summary of Key Factors in Matrix – Challenges to Participation

Much of the seminal literature discussed here and within the literature review relates to problems and issues experienced prior to participation, and focuses on barriers to learning rather than simply the inherent challenges facing participants. The term 'barriers' implies conditions and circumstances that preclude an individual from engaging in the learning activity, rather than challenges that can be overcome. By the very nature of this study, which does not look at non-participants, this chapter has looked solely at issues that the sample has faced as a result of choosing to join this particular learning activity, and therefore gives fresh insight in to the actual learning experience of such individuals. The psychological dimension is notably evidenced in the narrative data and extends Cross' (1981) discussion of dispositional barriers, and serves to reveal the range of indefinable and unquantifiable issues facing such adults. In this case these are specific challenges relating to readiness to learn and

apprehension, thus influencing an individual's confidence in their ability to participate effectively, and ultimately their unique experience of learning.

The professional dimension is not explicitly defined in the seminal participation literature. However, Fuller and Unwin's (2004) discussion on expansive-restrictive learning environments provide an initial lens by which to view the professional challenges faced by such participants, whilst allowing a general participation model to be developed within this study which is not restricted to an exclusive discussion of professional learning. The evidence suggests that professional challenges were significant for this sample, whereby they found restriction in the form of a lack of support from Managers and Colleagues, and alongside this, a lack of organisational funding that led to a personal financial burden. It was revealed, however, that these were not viewed as insurmountable barriers or challenges and that the sample viewed the professional benefits of participation as outweighing the challenges. Further to this, issues of standard entry requirements can be further explored through the context of the lifelong learning agenda and the professional and social pressures on individuals to up skill and educate themselves beyond that previously accepted or required of them.

Most significantly, the theme of work-life balance was revealed as the dominant personal challenge, yet links to all of the dimensions can be found within this emergent theme. Despite the inherent link to the nature of the learning activity, that of a professional qualification, it is not suggested that this theme would be exclusive to this particular research site. The key participation literature does not allude to work-life balance, but because of issues of work intensification and the changing nature of employment as a result of the growing knowledge economy and learning society, this theme may now be more relevant and prolific within studies of this nature and citing this as a significant challenge may now have merit.

6 ENABLERS OF PARTICIPATION

6.1 Chapter Structure

This final chapter of analysis and discussion concludes the exploration of the conceptual framework matrix by discussing the final key area of enablers of participation. This chapter follows a similar structure to the previous chapters, that of four main sections looking across the four dimensions of the matrix. The first section considers the psychological enablers, the second considers the professional enablers, the third looks at the practical enablers and the final section considers the personal enablers of participation.

As outlined in chapter three, enablers of participation were explored in the qualitative collection methods only, which included data from the final open question of the questionnaire (Q23, appendix 9.4) and from the one to one semi-structured interviews (appendix 9.5). This chapter explores the eight key themes emerging from the thematic analysis.

The eight themes identified within the four dimensions, and which are explored within this chapter, are:

- **Psychological Dimension**: Environmental Familiarity
- **Professional Dimension**: Support from Colleagues and Managers; Linked to Organisational and Professional Objectives; Relevant Work Experience
- **Practical Dimension**: Funding of Tuition Fees; Qualifications Held on Application.
- **Personal Dimension**: Support from Family and Friends; Support from Fellow Participants

It should be noted at this stage that the qualitative analysis has revealed that practical and professional enablers are the most prominent within the data, with the latter likely to be due to the nature of the learning activity in question (a professionally accredited Masters programme), with personal enablers having

less of an influence, and psychological enablers having limited presence. This is reflected in the following discussion.

6.2 The Psychological Dimension

Psychological enablers were explored using thematic analysis and it was revealed that psychological enablers were the least evident in the narrative data, with the majority of psychological factors appearing as reasons for participation (as discussed in section 4.2). Despite this, one theme was identified as being of some interest. This theme was interpreted and then labelled as:

1. **Environmental Familiarity:** An awareness and knowledge of the learning environment in terms of expectations and structures.

6.2.1 Environmental Familiarity

There was some evidence of *familiarity* with the university structure and environment being a means of enabling participation through confidence and awareness. Two of the seven interview respondents had studied at the same university previously, with both citing this as a key enabler in their decision to return:

> *'I think perhaps for me doing the course was easier because I had been here already; I'd spent three years here. It was an easy choice and an easy decision to make, because I was familiar and happy with the setup.' (IVR 5)*

> *'So, yeah, for me, I suppose, it was the know factor, you know, the knowing and, I suppose, it wasn't so scary for me, because I was familiar, and I'd been to the university for 4 years.' (IVR 2)*

Further to this, the 'Bridging to Masters Programme' (an access qualification offered by the same institution), was cited by a questionnaire respondent as being a useful way of gaining confidence in their own abilities and familiarising themselves with an otherwise previously unknown environment.

'This led me to the Bridging to Masters course offered at the university. After successful completion I felt more comfortable with the University environment and therefore applied to undertake the MSc HRM.' (QR 17)

Successful completion of a previous programme has instilled a level of personal confidence that has enabled the individual to take the next step up, and feel comfortable returning to that learning environment in a similar way to the previous respondents.

6.2.2 Key Points

These quotations suggest that the value of prior experience and familiarity with the same learning environment, whilst perhaps tacit and unarticulated, is high, and supports the view presented by Nonaka and Takeuchi (1995) that the mental models and skills developed as a result of context specific, ad-hoc and routine experiences is a useful grounding for enabling the individual to participate in subsequent, and possibly higher level, learning. Bandura (1977; 1986) further supports this suggestion, suggesting that through observation and experience we generate internal models of our environment and plan courses of action accordingly, thus acknowledging such experience as a useful enabler to future participation.

This brief discussion of the data relating to psychological enablers can be linked back to the earlier exploration of psychological reasons for participation, which demonstrated clear evidence of influence on reasons for participation (discussed in section 4.2). To an extent, the nature of the data suggests that psychological reasons often drive the choice to participate through the creation of goals and the developing perception of possible outcomes, whilst the psychological enablers can serve to break down the potential psychological barriers or challenges, such as low readiness or apprehension (as discussed in section 5.2.1). As this investigation has revealed minimal data regarding such enablers, further research is needed to support such links which are, at this stage, simply inferred.

6.3 The Professional Dimension

The most widely discussed set of enablers can be seen within the professional dimension of the conceptual framework matrix, revealing a direct link to the nature and focus of the learning activity itself.

Professional enablers were explored using thematic analysis and three key themes were interpreted and then labelled as:

1. **Employer and colleague support:** Positive support from subordinates, peers and senior colleagues from the participants place of employment.

2. **Links to organisational and professional goals:** Whereby the act of participation in the learning event was directly related and influences by either the goals of the organisation or the professional goals of the individual.

3. **Relevant work experience:** Whereby the participant has work experience directly related to the subject/nature of the learning activity.

6.3.1 Support From Colleagues and Managers

The most frequently mentioned professional enabler is that of *support from colleagues and managers,* however much of the data lacked detail and insight into actual behaviours and meaning. Despite this, the data reflects the value of workplace support when engaging with a professional education programme. Respondents tended to simply state that colleagues had been supportive without referencing specific sources of input. The data suggest respondents with a positive experience of colleague support simply wanted to acknowledge this fact during questioning, perhaps suggesting that intangible enablers such as moral support and motivational behaviours, whilst difficult to define, were viewed as important, as demonstrated in the following quotations:

> *'I wouldn't have been able to do it without management support.' (IVR 5)*

> *'Throughout the period in my HR, from the very beginning both my Line Manager and the Ombudsman have been very supportive and kept me*

going at times when morale has dropped. I have also had continuous support from colleagues including offers of proof reading etc…' (QR 24)

More specifically, employer flexibility was also evident, to an extent, in the narrative data. Respondents highlighted the value of not only time away for classes (on a more practical level), but a level of flexibility within the immediate office and team environment that served to also help manage the changing demands of the learning activity. One interview respondent illustrates this by alluding to periods of stress and how this was supported by management:

'…and they gave me ample time off, you know, for, if I felt, like, quite stress-y about, you know, maybe, reports that were due in, or whatever, they would say, do you know what, just spend Friday afternoon doing it.' (IVR 2)

On a more basic level simply being given time off without penalty enabled participation:

'I was given time by my employer and I didn't have to pay the time back or anything.' (IVR 5)

Further to this, another interview respondent describes flexibility and support in terms of awarding ownership of time and responsibilities:

'Well, we're still a fairly small HR team here, and my manager at the moment has been my manager through my time here. He's very supportive in terms of, well, the financial side, and the time off, he just lets me get on with my own workload, and manage it accordingly.' (IVR 3)

Whilst limited in detail the data suggests that support from colleagues and managers, including flexible approaches to working time, is considered to be an important factor in enabling the decision to participate as well as enabling on-going engagement with the learning activity. Such a supportive environment suggests evidence of expansive work environments, which play a critical role in influencing the nature of the participants' learning experience.

6.3.2 Linked to Organisational and Professional Objectives

Further to direct colleague support, the data suggests that participation in the learning activity was often tied to, and enabled by, *organisational and professional objectives*, with one interview respondent stating that participation in this particular programme was stipulated within their contract of employment:

> *'The HR director I was working for at the time. He was keen as part of my personal development that I did it, and, actually, he, sort of, stipulated in my contract that he wanted me to complete it within a certain timeframe.' (IVR 2)*

A more integrative approach was also evident with interviewees stating that participation in the learning activity formed part of their professional performance objectives, which in turn linked to the availability of practical resources, such as funding:

> *'It was, from a company perspective, and we set our development plans, and performance objectives at the start of each year, so, it was at the start of, or the end of 2009, start of 2010, that I knew I was going to be able to secure funding for it.' (IVR 3)*

This suggests that participation in such a learning activity was a planned intervention, linked to objectives and therefore likely intended to fill a skills or knowledge gap (Jarvis et al., 2003; Rubenson, 2010a). This finding was further supported in the occupational profile data collected, which found that 84% of the questionnaire respondents discussed their participation and progress on the programme during their performance review at work.

Finally, the data presents evidence of participation in the learning event, dovetailing with the wider organisational goals, as illustrated by the following quotation:

> *'My manager believes that my development, and by doing the course, matches the requirements of the organisation as the plans for growth and sustainability continue.' (QR 19)*

This is a useful quotation in that it succinctly illustrates that links are being made by the employers between the value of learning and development interventions and the related corporate investment in the competitive advantage of the organisation, and potentially the economy in general.

6.3.3 Relevant Work Experience

The final professional theme suggests that having *relevant work experience* influences and enables active and on-going participation in the learning activity in question. Respondents alluded to the role that previous work experience has in their ability to pursue such activities, with one respondent stating the benefits and enabling characteristics of such experience:

> *'I am actually glad that I was able to gain 6 years of HR work experience before starting the course last year as I believe that this has given me perspective and a practical understanding of some of the subject areas. I also appreciate the value of the qualification more and see the benefits in developing my professional knowledge and understanding' (QR 16)*

This quote demonstrates the role of prior professional observations and experiences and how they influence subsequent courses of action within an individual's career. Bandura (1977; 1986) proposes that the developing personal and professional values and goals influence future learning decisions, with past experience not only serving to possibly present barriers to participation, but also becoming a key enabling factor to the act of participation. This is further demonstrated by a respondent who reflected upon their current position and realised that a new challenge was required. A decision which ultimately led to a role that supported professional learning:

> *'I worked in this position for 3 years, and felt I had achieved everything I possibly could within that role, so looked for a new opportunity. I was successfully appointed to my current role as HR Coordinator in May 2008, an attractive aspect of this role was there was an expectation the successful candidate would study for their CIPD qualifications funded by the organisation.' (QR 31)*

Kolb (1984) also suggests that individuals construct meaning and place values on goals through actual experience, and in the case of one respondent this was achieved simply through contact and discussion with the relevant professional environment, thus realising the relevance of the learning activity and therefore enabling the decision to participate:

> *'I did some work experience for a family friend who is an HR Director and having spoken to her and the rest of the team, it became clear that to succeed in the field I would require the CIPD qualification.' (QR 8)*

The data therefore suggests that within this research setting the bank of experience and prior knowledge held by an individual serves to support and enable learning and development experiences and interventions as they progress through their working life.

6.3.4 Key Points

These themes represent an apparent 'bundle' of work-related enabling factors that led to active participation in the learning activity in question, and references the varying levels of factors that influence and enable participation. At the individual level, the participants' professional background (and in this case, specifically *relevant work experience*) provides a grounding of professional knowledge and awareness; at a team level, *employer and colleague support* and flexibility provide the day to day and on-going direct support and influence, and finally; linking learning to *organisational and professional goals* closes the gap between the learning objectives of the individual and the relevance of the learning to organisational progress and success.

Evidence of this bundle suggests the value of an expansive learning environment whereby such factors enhance readiness to learn, encourage participation and support engagement in the learning activity, even if it occurs 'off-site' (Fuller and Unwin, 2004). The themes identified within this research setting demonstrates some of the key characteristics of an expansive environment in context, and extends the discussion of the restrictive factors identified in the previous chapter. The literature suggests that such characteristics serve to enable the extension of professional communities of

practice, provide an outlet for reflection on current practice, and generate a route to achieving qualifications that aid the progression of both the individual and the organisation as a whole (Fuller and Unwin, 2004; Lave and Wenger, 1991). From a broader perspective the data suggests evidence that some of the employing organisations are demonstrating characteristics of a learning company, described specifically by Pedlar et al. (1991) as an organisation that facilitates and enables the learning of all of its members. This data cannot support the view that the employing organisations are all learning organisations, but does support the view that those that support their employees in such a learning activity are, to an extent, generating a form of learning culture (Burgoyne, 1995) and relating the value of such an activity to their on-going economic success, thus going some way to creating a 'growth-medium', enabling employees to participate in such activities (Reynolds, 2004).

6.4 The Practical Dimension

Practical enablers were also particularly evident in the narrative data. These practical enablers were explored using thematic analysis and two key themes were interpreted and then labelled as:

1. **Funding for tuition fees:** Whereby participants are fully or partly funded by their employer.
2. **Qualifications held on application:** Referring to formal qualifications held by the participation at the point of application.

6.4.1 Funding for Tuition Fees

Of note, and in connection with section 5.3.1 (Professional Challenges – *Restrictive Learning Environments*), those receiving *funding for tuition fees* suggested this was a significant enabler of their participation on the programme.

From the occupational profile data collected through the questionnaire, it should be noted that 39.5% of respondents were fully funded by their employer, 27.9% were partly funded by their employer, and the remaining 27.9% were entirely self-funding, demonstrating a good level of financial investment from the employers. The data from this research setting suggests, however, that whilst a

lack of funding was often a challenge, it was not always seen as a conclusive barrier or major challenge to participation, as this quotation illustrates:

> *'From a financial perspective, ultimately, if it had been on-going, and on-going, that I wasn't getting it funded, I would have found a way to support myself financially…' (IVR 3)*

Respondents were clearly grateful for any level of financial support, viewing it as a key practical enabler, as highlighted here:

> *'I am fortunate enough to work for an organisation who support me by paying 75% of my fees and allowing me time off to attend class.' (QR 28)*

> *'The support is definitely beneficial. There was the financial support that they'll give, it's just better than nothing.' (IVR 7)*

Further to this, one respondent commented on a negotiated arrangement for part funding that extended the practical support received in light of the financial shortfall:

> *'I am paying for half the course and this on my own initiative (I did manage to negotiate that my work would pay up front and then deduct monthly amounts from my salary, which has been very helpful)' (QR 19)*

The data has presented funding as a key topic in the discussion of practical enablers of participation in learning. The previous chapter illustrated the challenges faced by those who are part-funded or self-funded, with the financial burden acknowledged as a significant barrier and often explored in the literature. The seminal literature on participation appears to have made assumptions as to the value of financial support, possibility due to the variety of learning interventions available, therefore underestimating its influence on an individual's ability to engage in a learning activity of this nature. It must also be acknowledged that a level of freedom from the financial burden enables participation from not only a practical perspective, but with potential implications

for their psychological, personal and professional relationship with the activity, and specifically within this research setting, their employer.

6.4.2 Qualifications Held on Application

Qualifications held on application to the Masters programme have also been highlighted by some as an important enabler of participation, with a particular emphasis on doing the 'bridging to masters' course, an access programme offered by the institution as a route to Masters for those with non-standard entry requirements. The data suggests that only respondents who had atypical academic backgrounds referred to their qualifications, emphasising the opportunity provided by engaging with the access programme, directly enabling them to progress on to the learning activity in question. More specifically, the development of study skills during the access programme was highlighted by one interview respondent, and viewed as a valuable tool to take forward:

> *'…I wanted to do it [the masters], but I was informed by here [the university] that because I didn't have a degree and would have to do the Bridging programme…, which I feel was invaluable looking back, because although I worked in HR I'm not an academic. The report writing and all of those things wasn't my strength… (IVR 4)*

Further to this, a questionnaire respondent alluded to the development of time management skills as a result of the access programme, as well as the development of study skills:

> *'This course [Bridging to Masters] was recommended to people like myself who were looking to progress to the MSc, had HR work experience but had never attended uni in the past. […] Looking back, this course was definitely worthwhile and set me on the right tracks for the MSc. Although I had relevant work experience, this course was particularly helpful in developing my study skills as well as organisational and time management skills. It also got me used to being in the 'uni environment'…' (QR 1)*

It is apparent from the data that this particular pre-intervention was a critical enabler to some participants and directly facilitated access to the learning

activity. Similarly to the value of relevant work experience as discussed in section 6.3.3, such knowledge developed prior to joining the specific learning activity supports the individual as they progress and engage (Knowles, 2011). In addition, this prior experience of academic life influences the participants readiness to embark on further learning experiences (Manninen, 2003).

6.4.3 Key Points

This presentation of the two key practical enablers has provided an indication of the setting specific issues faced by participants in this learning activity. Whilst the seminal literature on participation focuses mainly on identifying the common practical challenges faced by participants, the discussion can be positioned within the context of the Self-Directed Learning Continuum as identified and discussed by Tough (1971), followed by Knowles (1975), and later developed by Spear and Mocker (1984) and Danis (1992). Practical issues relate to the identification of resources required in order to be able to participate, an action which is preceded by the identification of the learning need, and followed by an evaluation of the outcomes of said learning. The nature of the two themes identified imply that such resources will often be unique to the learning activity, if not to the individual and their particular set of circumstances, in this case, the funding of a high value learning activity and access requirements for post-graduate learning.

6.5 The Personal Dimension

There was notable evidence in the narrative data to suggest that personal enablers were significant to the respondents in supporting their initial and on-going engagement with the programme. Personal enablers were explored using thematic analysis and two key themes emerged and were interpreted and labelled as:

1. **Support from family and friends:** Whereby the participant has received help and assistance from friends and family in order to actively participate in the learning activity.

2. **Support from fellow participants:** Whereby the participant has received help and assistance from fellow participants (students) in order to actively participate in the learning activity.

6.5.1 Support From Fellow Participants

It was noted with particular interest that there was significant discussion of the value of peer support in the form of fellow students on the programme. The opportunity to share ideas and concerns and provide mutual moral support was viewed as a key enabler. This finding reflects the key literature relating to Situated Learning Theory (SLT) presented by Lave (1988) and Lave and Wenger (1991), which highlights the role of the group in adult learning activities, focusing on the value of social interaction and its influence on an adult's ability to participate and gain authentic learning experiences. Respondents alluded to the fact the fellow participants provided on-going practical guidance and support, as illustrated by the following quotation:

> *'And there was support from the group that you found yourself in, from the very beginning we were all put in groups and we tended to stay in these groups for the whole two years, and we very much got support from each other in that. Our group did certainly. When it came to essay writing and stuff like that we all supported each other a great deal.' (IV 5)*

Course-related guidance and support was complemented by working with individuals in a similar line of work, highlighting the advantages of being able to share information and experiences, with the following quotation demonstrating the value of informal benchmarking:

> *'I guess I wanted to meet new people in the same line of work. From the 'learning communities' that we were grouped in, I feel this has worked very well. I have met some really nice people who I have worked with over the past couple of years. This has been in regard to bouncing ideas of each other for coursework as well comparing how our organisations do things.' (IVR 4)*

The data suggests that such ‘communities of practice’, groups of individuals within a learning environment that share experiences, thoughts, ideas and debates in order to find solutions to problems, provided not only useful practical support, but moral and psychological support during challenging periods (Fuller and Unwin, 2004; Fenwick, 2010). The exchange of shared experiences and the discussion of concerns and problems influenced the confidence levels needed to continue on the programme, as evidenced by the following quotation:

> *‘I felt for me, it’s a confidence thing, they’re in the same boat and you can have a chat. I would be in a panic and she [fellow student] would say it’s fine, then sometimes she’ll phone me and I say it’s fine. It’s really bizarre because it just goes round…. So as soon as work ramps up and I’ve got other stuff going on it’s good to have that support…’ (IVR 4)*

On a similar vein, the data suggests that there also appears to be value in knowing there were others in the same position in terms of work and family commitments alongside participating in the programme, and that this was a significant source of support during the key busy points in the programme:

> *‘So I think that that all got a bit stressful and I think we were all in the same boat at that point, which is probably one of the times that we all used each other for support.’ (IVR 1)*

Equally, there is evidence to suggest that individual moral support from fellow participants was an enabling factor for some respondents, with the same respondent suggesting that fellow students often provided words of encouragement:

> *‘So I think definitely the group of girls was a great help whenever one of us had a bad day it was like; come on, you can do it.’ (IVR 1)*

The key message from respondents appears to be that social support from fellow learners, both individually and in the form of organised learning communities, has proved to be a key enabling factor in their on-going active participation in the programme.

6.5.2 Support From Family and Friends

In this, the final theme, the data suggests that *support from family and friends* was also a significant enabler to on-going active participation in the programme, with respondents focusing their comments on the role of supportive friends and partners, and particularly their understanding of the time commitment required to participate in the programme, with one respondent indicating that continued patience with their situation was a concern, but appreciated:

> *'I think, firstly my boyfriend. I live with him and he suffered me disappearing to study and being in a grump and just kind of gave me time to kind of get on with it. Also my friends have been very sympathetic because the point where you keep saying no to social things and you think they're just going to stop asking me because I don't have the time to go.' (IVR 6)*

Further to this, there was notable evidence of encouragement and influence from respondents families to pursue Masters level learning, with respondents citing encouragement of close family as a factor that served to enable them to make the decision to participate:

> *'I suppose, I wanted to focus on my career for a while, and I thought, oh, I'll do it later down the line, but, I think, probably, work gave me that push, but also maybe a bit of influence from my parents. (IVR 2)*

> *'I was encouraged by close family to apply for the MSc in HRM on the completion of the CPP.' (QR 17)*

Finally, two interview respondents summed up the value of social support citing family, friends and colleagues as all taking a key role in enabling their successful learning experience.

> *'I knew the course was going to be hard work, especially working full time, however I have the support of both my friends and family, and my employer.' (QR 5)*

'Well, obviously my husband, but my best friend, Paula, she was a great inspiration and my director who retired, absolutely phenomenal, they read my essays, they gave me moral support.' (IVR 7)

Whilst the role of friends and family in enabling participation in learning is not distinctly apparent in the learning literature, the data suggests that the dedication of personal time, and the decision to take that time to engage in such an activity, is made easier by the understanding of friends and family, and that these social and familial roles are a significant influencing factor over the relative success of the learning experience.

6.5.3 Key Points

The evidence of perceived personal enablers has provided an indication that the influence and behaviours of friends and family, as well as of fellow learners, plays a key role in enabling participants to not only make the decision to participate in the first instance, but to also provide personal support throughout, therefore paying a key role in enabling continued and active participation in the learning activity. These social enablers relating to the benefits and influence of social interaction and communities of practice dovetail with previous discussions of reasons for participation, wherein the developing *social dynamic* (section 4.5.2) was considered a key reason for joining the learning activity. It is apparent that the hope for such a dynamic to become the reality has been realised and that it is providing essential support mechanisms as the participants progress and meet a variety of related challenges. Despite an apparent lack of literature currently in place to frame the role of friends and family in enabling participation, the evidence here suggests that they play an important role as a form of community of practice, in that friends and family function as a source of shared social experience, providing a sounding board for the discussion of plans and concerns, therefore enabling commencement and continuation of participation in the learning activity.

6.6 Presentation of Conceptual Framework Matrix: Enablers

Table 6.1 summarises the findings of the primary data analysis using emergent thematic analysis. It highlights <u>all</u> themes identified as enablers of participation

in the identified learning activity across the four dimensions, whilst drawing attention to the key themes which have been most notably evidenced in the narrative data.

Area of Interest	Dimensions	**Psychological** Definition: Affecting or arising in the mind, related to the mental and emotion state of a person	**Professional** Definition: Related to, or connected, with a profession and/or job	**Practical** Definition: Concerned with the actual doing or use of something	**Personal** Definition: Affecting or belonging to a particular person rather than to anyone else
Enablers **Definition: To supply with the means, knowledge or opportunity**	**Key Emergent Themes**		**Support from Colleagues and Managers**	**Funding of tuition fees**	**Support from friends and family** **Support from fellow participants**
	Further Emergent Themes	**Familiarity**	**Links to personal and organisational objectives** **Had relevant work experience**	**Qualifications held on application**	

Table 6-1: Summary of Key Themes in Matrix – Enablers of Participation

The data presented in this chapter has emerged from the broader qualitative discussions relating to the reasons for, and challenges to, participation in an adult learning activity. In comparison to the challenges, or potentially restrictive factors presented in the previous chapter, the exploration of enabling factors across the four identified dimensions reveals evidence of a force field, whereby enabling factors can often help mitigate the effects of these challenges (Miller, 1967).

The data suggests that enabling factors across the four dimensions, but less so within the psychological dimension, should be considered as key resources that facilitate active and on-going participation in adult learning activities. It is proposed that the relative and varying need to draw upon these resources, and the nature of the resources themselves, are unique to the learning activity itself on one level, and to the individual and their particular set of circumstances on another. The evidence presented here suggests that enabling factors exist on three levels: the individual, in terms of their own knowledge, perceptions and experience; workplace colleagues, family and friends existing as a form of

community of practice, and finally; at organisational or societal level, whereby expansive learning environments can be created by models of the learning organisation or through the existence of the learning society and the prevailing learning culture. Strong workplace influences are evident within these results and discussion, and are to be expected given the nature of the learning activity under study, and highlight the significant role an employer can take in enabling participation in adult learning activities.

7 CONCLUSIONS

The conclusion begins with a discussion of the key findings of this study and two principal recommendations for enhanced and improved practice within the research setting are proposed. Further to this, the contribution to wider practice is discussed in section 7.2, and a consideration of the opportunities for wider usage of the framework is presented. A consideration of this study's contribution to knowledge is provided in section 7.3. The thesis ends in section 7.4 with a review of the extent to which the study has met the stated research objectives and a reflection on the study with suggestions for further areas of related research.

7.1 Discussion of Key Findings

The original conceptual framework matrix developed in this study is designed to be used to provide a multi-dimensional view of the context of participation in adult learning activities. A review of the related literature revealed the lack of a single open framework that considers the reasons for, the challenges to, and the enablers of participation across defined contextual dimensions, for the purposes of understanding the nature of participation itself. The central purpose of this thesis was to fill this gap by developing and trialling a framework matrix that affords the opportunity to identify and explore the dominant factors relating to participation in adult learning for an individual or group of individuals.

The matrix identifies the three key areas of interest: i) the reasons participants have for joining the learning activity; ii) the challenges they have faced in doing so, and finally; iii) the elements and influences that enable them to successfully and actively participate in the learning activity. In turn, the matrix breaks these areas down further across four dimensions of the participants' life world, that of the psychological, the professional, the practical and the personal. This reveals a matrix structure through which a specific set of dominant factors that define the nature of participation can be identified through appropriate data collection and analysis methods. The purpose of identifying these factors is to inform practice in the areas of participant support.

During the course of this study, the conceptual framework matrix, developed from the literature, has been applied in two principal ways. Firstly, as a theoretical device by which to organise and review current literature in the field and secondly, as a means of presenting the findings of this study.

7.1.1 Use as a Theoretical Device

The design of the conceptual framework matrix was informed by the seminal literature in the field of participation in adult learning (reasons and challenges) and from the wide-ranging literature on the nature and context of adult learning (enablers). In turn it became a useful theoretical device, or lens, through which to organise and assess the available literature (see tables 2.1 and 2.2). As a result, lists of factors and typologies can be subject to a form of meta-analysis in order to discover wider patterns and trends within the seminal literature and beyond. The device did not contribute to the discussion of enablers due to the disparate nature of the associated literature, highlighting the lack of specific models in this area.

It was noted in chapter 3 that theoretical frameworks proposed in the participation literature were, on the whole, prescriptive and restrictive with a tendency to pigeon-hole individuals' reasons and challenges related to participation in adult learning. Reasons for participation were considered from a number of angles, including that of motivational orientations to learn which has been continuously developed since the 1960s from the seminal work of Houle (1961) by notable authors in the field of participation in adult learning such as Shefiield (1962; 1963; 1964), Johnstone and Rivers (1965), Boshier (1971; 1973; 1977; 1980), Morstain and Smart (1974) and Wlodkowski (1985) who all presented a range of typologies identifying orientations to learn with little reference to context. Further to these, the broader remit of decisions to learn was explored by Miller (1967), Rubenson (1978), Cross (1981), Cookson (1983; 1986) and Courtney (1992) wherein they presented models of participation which usefully considered the forces at play when adults choose to participate in learning, but yet lacked the guidelines for the effective application of the model as an exploratory framework. The range of literature available confirms the exploration of reasons for participation as a relevant area of interest. The

mapping exercise revealed the lack of an open framework that avoids the restrictions of generic typologies and lists, and that can be used to identify reasons from the unique and ever-changing context of the participants' life-world.

Further to this, the exploration of the barriers faced by prospective learners was favoured in the literature over an understanding of the challenges faced by active participants before and during their learning journey. This exploration was again dominated by lists and typologies by authors such as Johnstone and Rivera (1965), Carp et al. (1974, cited in Henry and Basile, 1994), Houle (1980), Charnley et al. (1980 cited in Jarvis, 2010), Cross (1981) and McGivney (1990). Much of this identified literature on barriers to participation focused on non-participants and does not address the real challenges faced by active participants (as in this study), that do not necessarily preclude them from participating, but may make on-going and active participation more difficult.

Specific models and frameworks related to the enablement of participation were identified as being missing from the literature and could therefore not be mapped on to the framework, thus identifying a further gap. A review of the disparate literature on the nature of adult learning (Merriam, 2010; Lave, 1998; Lave and Wenger, 1991; Fuller and Unwin, 2004; Bandura, 1977, 1986; Kolb, 1984; Knowles, 1968, 1975; Tough, 1971) and the prevailing contexts (Field, 2010; Rubenson, 2010a; Jarvis, 2010; Garavan, 1997; Pedler et al. 1991; Reynolds, 2004; Schein, 1992; O'Keefe, 2002) indicated that enabling mechanisms were a critical factor in on-going and successful participation in learning. The literature alludes to the fact that an understanding of these mechanisms can contribute to a complete view of the lifewide context of participation, and that it can act as a form of appreciative enquiry to ensure that the appropriate enablers are promoted and encouraged by the relevant bodies. Whilst useful in terms of signposting the broad enablers of learning, the literature does not serve to identify the specific dominant factors relative to the individual, nor does it provide a useful typology or framework on which to map them.

The conceptual framework developed here, therefore, has the potential not only to extend and develop the existing theory but potentially resolve some of the criticisms the models have faced. The framework is, by its very nature, open and flexible. It adds to the discussion of adult participation in learning by providing a single model within which to explore unidentified and often unique reasons, challenges and enablers from a lifewide perspective, with the potential to reveal themes and issues out with the remit of current participation literature. It therefore provides a single route by which to explore all three identified influencing factors.

7.1.2 Findings Within the Research Setting

A complete view of the data gathered in this study is presented within the framework matrix in table 7.1, and provides insight in to the context of participation in the chosen research setting, revealing the specific variables that have influenced the act of participation in the identified learning activity. The key factors identified during the earlier discussion have been highlighted in yellow across the three areas of interest, alongside the additional factors that were revealed.

Area of Interest	Dimensions	Psychological	Professional	Practical	Personal
Reasons Definition: The cause, explanation, or justification for an action or event	Key Factors(s) →	**Self-Actualisation** **Empowerment**	**Professional Transformation** **Enhancing Professional Profile**	**Constructive Use of Time**	**Personal Achievement + Life Transition**
	Further Factors	**Personal Impact**	**Organisational Catalyst** **Ascertain Professional Value**	**Improve Socio-Economic Position** (limited evidence) **Suitable Geographic Position** (limited evidence)	
	Emergent Themes			**Structure and Timing of the programme**	**Social Dynamic**
Challenges Definition: A test of one's resources or abilities in a demanding but stimulating undertaking	Key Factors(s) →	**Apprehension** **Low Readiness**	**Restrictive Learning Environments**		
	Further Factors		**Low Organisational Impact** **No Rewards Benefits**	**Restricted Access** **Institutional Limitations** **Logistical Issues**	**Limited Learning Identity** **Immutable Personal Circumstances** **Perceived Educational Distance**
	Emergent Themes				**Work-Life Balance**
Enablers Definition: To supply with the means, knowledge or opportunity	Key Emergent Theme(s) →		**Support from Colleagues and Managers**	**Funding of tuition fees**	**Support from friends and family** **Support from fellow participants**
	Further Emergent Themes	**Familiarity**	**Links to personal and organisational objectives** **Had relevant work experience**	**Qualifications held on application**	

Table 7-1: Conceptual Framework Matrix – Research Results

This research demonstrates that the participants chose to engage with and experience learning activities as a result of a wide range of influencing factors. These influences can be seen through the lens of the matrix consisting of the four dimensions of the participants' life-world. The unique set of reasons given for participation, challenges faced in doing so, and the range of enabling

elements all interact within the matrix to generate a unique profile of the context of participation relative to the learning activity under scrutiny - a part-time, professionally accredited, master's degree programme in HRM.

Reasons for participation in this learning activity are dominated by two of the dimensions. Firstly, the research has revealed that the nature of the learning activity concerned has strongly influenced the need and desire to participate, in that it is viewed within the professional dimension as a means to improving professional credibility, security and career trajectory as a route to future-proofing their careers and employability (Morstain and Smart, 1974; Havighurst, 1973; Illeris, 2003a, 2003b). This is logically coupled with evidence of psychological reasons, in that participation is viewed as a contributing element in the achievement of self-actualisation and a means of self-empowerment, with the principal objective being the creation of a sense of achievement (Schneider et al. 2001; Huczynski and Buchanan, 2010; Courtney, 1992; Nonaka and Takeuchi, 1995). The evidence suggests that within this sample there is a clearly acknowledged sense that the act of participation in learning is a uniquely owned and managed journey, not solely driven by tangible outcomes such as accreditation or promotion (Jarvis, 2010; Huczynski and Buchanan, 2010). This emphasises the notion of successful participation in a learning activity as a goal to be targeted and achieved by the individual rather than purely dictated and driven by a third party, or in this case, the employing organisation.

Despite this positive account, the data has revealed both the internal and external challenges faced by the participants throughout this journey. These challenges are dominated by psychological factors, further highlighting the strong sense of a unique learning journey outlined by the participants. The data suggests that participants experience apprehension related to their ability to be successful learners and, despite their motives for engaging in the learning activity some allude to a lack of readiness to learn (Knowles, 2011; Cropley, 1980; Radovan, 2003). The other principal challenge identified in the study was that of working within a restrictive learning environment wherein there is a lack of encouragement and support for participation in the workplace, and whereby

work life balance is difficult to achieve when choosing to participate in a learning activity and work concurrently (Fuller and Unwin, 2004; Felstead et al., 2002).

Notably, the results reveal a relationship between these internal and external challenges in that the most useful source of support, or enabler, is people, rather than specific mechanisms, systems or structures such as funding, time off work, or professional development reviews (appraisals). For the respondents of this study, these enabling individuals were from all aspects of their life-world. They were colleagues and managers from within their workplace that provided professional as well as moral support, they were friends and family, and they were fellow participants in the learning activity that understood the pressures of participation. The data demonstrated that such support was drawn upon dependent on the needs of the individual, whether that was professional guidance, psychological and personal support, or practical assistance in order to engage in on-going active participation.

The strength of evidence presented in this study, evidence triangulated across both quantitative and qualitative data sources, indicates that the reasons given for participation in the learning activity in question, partnered with the relevant enablers, work against the challenges faced by the learners within a force-field of factors. A combination of the strength of the reasons given for participation and the enabling influences available mitigated the challenges faced, thus ensuring successful and on-going participation in the learning activity.

An understanding of learners' unique experience of participation and their capacity to mitigate challenges to their on-going learning through sound reasons for doing so, and the enabling resources available to them is a crucial tool in programme development. It serves to ensure appropriate participant support practice in order to ensure successful, on-going participation in the learning activity. The data gathered using the conceptual framework matrix has revealed the notions of self-actualisation, empowerment and personal and professional development are critical reasons for joining the learning activity in question, and that learning for these purposes is goal driven, and guided by the participant as an 'owned' journey. To ensure the success of that journey and to mitigate the challenges experienced, such as a restrictive learning environment

and feelings of apprehension and low readiness to learn, a range of mechanisms could be considered or enhanced by programme managers and facilitators of the learning activity under investigation. Two key recommendations can be immediately derived from the results.

1. Encourage and create communities of practice:

The importance of people as the principal enablers to participation cannot be underestimated and has been clearly evidenced as a key enabler within this research setting. Managers and colleagues and learning peers are the main source for the development of communities of practice that can support and influence the learning journey. The role of the group is well documented in the literature (Lave, 1988; Lave and Wenger, 1991; Wenger, 1999) and emphasises the authentic nature of the context of the chosen learning activity, which in this case has close links with the learners' workplace. The results of this study have revealed particular emphasis on the benefits of the social factors of the learning journey and particularly interaction with others. The development of communities of practice, within the learning environment and in an organisational setting allow for such relationships to form. They provide an opportunity for participants to share experiences, thoughts, ideas and arguments in order to find solutions to problems, quality improvement methods, and to potentially develop where necessary a shared vision and mutual values. These groups can aid the achievement of personal and professional goals and help to mitigate the challenges experienced by the learner during participation, such as apprehension and a lack of confidence. It is proposed here that such groups take the form of formally organised and recognised groups that are created either by the learning provider/facilitator or by the participants themselves. Such groups provide a mechanism to support professional and personal development planning and reflection through discussion and idea sharing, and/or used for the purpose of co-ordinating group activities or assessment. More informal communities, that are created and managed by the learners themselves, take the role of learning communities and study groups that share ideas, experiences and concerns related to the requirements of the programme, or simply act as a social extension to the learning activity.

In addition, by developing links with the participants' employers as outlined in recommendation number two (following), programme providers can help facilitate the creation of similar communities within the employing organisation. Coaching and mentoring arrangements between participants and experienced colleagues would allow for the discussion and placement of the learning acquired within the workplace context. This has potential to be an extension of a professional development review, and would serve to define links between the learning acquired and both organisational and individual objectives. Further to this, involvement in knowledge exchange groups consisting of employees from all levels of the organisation would require the learner to communicate newly acquired knowledge and ideas to a range of colleagues. This would provide a platform on which to explore and test ways in which to apply new learning and gain feedback on its' practical value and feasibility, from a variety of perspectives. This has the potential to result in increased professional credibility, a wider professional knowledge base and network, and enable a growing self-confidence.

2. Develop links between the programme provider and employers:

Due to the nature of the activity, in that it is a professional accredited programme, it is relevant to further address the association between learning and the workplace. Developing links and lines of communication between the programme provider and the workplace, as a means of ensuring mutual understanding of the purpose and requirements of the learning activity, is a route to ensuring that effective support for participants is provided (including the creation of the aforementioned learning communities). This study has shown the value of support from within the organisation, such as providing coaching and mentoring from colleagues and managers, linking the learning with individual and organisation goals during performance reviews, and practical support where possible, such as time away for study and the funding of fees. These efforts demonstrate investment in the individual, whilst going some way to aiding the individual in creating work life balance. To achieve this understanding it is recommended that the programme providers make available information regarding learning outcomes and the transferability of knowledge

gained in to the workplace, with the purpose of highlighting the value of the learning, and the potential for a return on any investment. This information can be provided in the form of an employers pack, which includes course related information as well as guidance on how to synthesise the learning outcomes with the participants' job role and to organisational objectives. This can be made available to the participants' line manager, mentor or coach, either online or in hard copy. Further to this, a pre-participation open event could be held, whereby leaners and their managers are invited to meet programme managers and facilitators to discuss the programme requirements and the implications of undertaking the programme whilst working. Such an event would be held during a wider university open day so that representatives from the institutions facilities and service departments are also available to provide relevant information. Both suggestions provide an opportunity for employers and the programme providers to gain a more detailed insight in to motives of the learners themselves and gauge their suitability for the programme. The information and insight can then be applied more effectively within the specific work context in order to further enable the learning journey.

These suggestions not only reflect the specific outcomes of this study within the research setting, but also the social view of learning as a means of ensuring an expansive learning environment or context, as described by Fuller and Unwin (2004). This allows for the consideration of all of the key features and environments related to this research - that of the organisational, the pedagogical and the social contexts of adult learning.

7.2 Contribution to Wider Practice

In addition to recommendations within the research setting, contribution to managerial practice is a fundamental part of a professional doctorate (Duke and Beck, 1999; Ruggeri-Stevens et al. 2000; Dent, 2002). Accordingly, the research design developed from an original conceptual framework takes wider practical relevance in to account. The assumed users of the research results from this study are the programme managers and facilitators related to the specific research setting (the particular learning activity) as a means of enhancing or improving current practice in participant support, internally and

externally, for the purpose of enabling adult learning. Beyond this, the specific results may be of interest to those associated with programmes and activities at a similar level and mode of delivery within the broader university faculties and similar institutions offering credit bearing adult learning programmes. They may find the results of interest as a means of gaining initial insight in to participation at this level or as a means of benchmarking against their own provision or data.

As discussed, during the course of this research the conceptual framework matrix has been applied to the body of literature and to the particular research setting, and guided the chosen methodology of this study. It is relevant to step back from this and consider the wider usage of the framework itself across the broader remit of adult learning interventions. The matrix has the potential to contribute to practice as an open, exploratory framework that can be used as a means of gathering and organising information regarding participation in learning. The framework matrix, which has been developed from theory, has the potential to be applied to a variety of different learning activities. The open nature of the framework matrix allows the user to discover a dominant perspective or influence. In the case of this study, results have shown the significance of the professional dimension due to the nature of the programme itself. Following further research to establish the transferability and usability of the framework matrix (discussed in the following section), it could be applied across all organised adult learning activities, including vocational and non-vocational further and higher education programmes and non-accredited learning activities (such as evening classes) across all delivery modes. It would serve to reveal the dominant issues related to that particular intervention. The results revealed by the framework can subsequently be used within the different contexts to identify areas of improvement or change required in order to address these issues of participation.

The notable value of such an open framework is that a variety of methodologies can be used, dependant on requirements and the activity itself, to gather the data and populate the matrix. Purely quantitative or qualitative research could be carried out to identify the themes and/or factors, as well as the framework being used by the learners themselves as a means of exploring and recording

their own thoughts and reflections on participation in their chosen learning activity. It is therefore not dependent on the user applying the same research methods as in this study. The focus does remain the same however, in that dominant factors relating to participation can be uncovered.

7.3 Contribution to Knowledge

The development of an original conceptual framework matrix, subsequently trialled within a particular research setting, has revealed that participation in adult learning is influenced by a combination of factors that can be located within the varied areas and dimensions of the learners' life-world. The framework matrix presented here affords a multi-dimensional view of the context of participation in adult learning activities.

This study adds to the existing body of influential literature by providing a single open framework that synthesises three principal areas of concern regarding participation in adult learning. The framework crucially serves to consider the influence of enabling factors which had previously been a present, but disparate, area of study.

7.4 Reflection

In general, the aim and four research objectives of this study have been achieved. This research journey has presented valuable developmental opportunities for the author, as well as exposing the limitations arising from the chosen research design.

The aim of this study was to investigate reasons for participation in adult learning, the challenges to participation, and the enabling factors related to participation in order to enhance the quality of participant support practice. The following provides a brief summary of how these objectives have been achieved.

1. **to develop a conceptual framework through a critical review of the key literature in the field of adult learning and that of participation in adult learning.**

This objective has been achieved through the development of the original conceptual framework matrix, created as a result of a critical review and mapping exercise of the seminal adult learning and participation literature presented in chapter 2.

2. **to investigate participants' perceptions of their reasons for participation in adult learning, the challenges they faced before and during participation, and the enabling factors related to their participation.**

The target population was identified and were questioned on their perceptions of their experience of participation in the chosen learning activity. The results of this study, discussed and presented in chapters 4, 5 and 6, have revealed the key factors relating to participants own reasons, challenges and enablers relative to the research setting.

3. **to trial the effectiveness of the conceptual framework of participation in adult learning as a tool to enable academics and institutions to enhance and improve participant support practice**

The empirical research conducted has enabled the fulfilment of this objective, in that a range of research methods have been identified and applied to the research setting, guided by the requirements of the conceptual framework matrix. As discussed in chapter 3, a mixed methods research design involving a questionnaire and one-to-on interviews were subject to rigorous analysis using factor and thematic analysis, and revealed the key factors within the three areas of interest across the four identified dimensions. Internal validity was established and results derived from each method, and presented in chapters 4, 5 and 6, appeared congruent.

4. **to present recommendations for improved practice within the research setting, and opportunities for the wider application of the framework**

Logical recommendations have been made within this final chapter with a view to enabling programme managers, learning facilitators and institutions to

enhance and improve participants learning experiences through improved student support. Specific recommendations include the creation and encouragement of communities of practice and the development of information and support for employers. In addition, suggestions are made to the potential uses of the framework out with the research setting.

More specific reflections can also be made. The use of principal component factor analysis was a decision made on two levels. Firstly, methodologically it allowed for the gathering and analysis of a large amount of concise data across nine of the twelve fields of the conceptual framework matrix. The question style required to conduct factor analysis afforded the opportunity and space to gather data for two out of the three key areas of concern, allowing for a large number of items, developed from the literature, to be included (Qs 21 and 22). This approach, supported by additional qualitative data, appears to have provided a well-rounded view of the research issue through the triangulation of data. Secondly, the use of complex statistical analysis of this type has afforded the author an opportunity to develop skills in an area of research which had previously appeared daunting and with little relevance to the study of human perceptions. This skill can now be taken forward to future research activities.

Whilst the use of statistical analysis methods, such as factor analysis, has proved relevant in this instance, it is acknowledged that there are drawbacks to its use as a means of triangulation with interpretive data, in that it also requires a significant element of subjective interpretation and reasoning in order to make sense of the results. Despite the influence of the relevant literature, subjective choices are inevitably made when labelling and describing the identified factors. Roberts et al. (2009) highlight that two identically qualified researchers can interpret such results in different ways. Despite these issues, the author maintains support of critical realist ontology, guided by a post-positivist epistemology whereby conclusions are drawn from multiple fallible perspectives that provide as accurate an image of reality as possible. A principal outcome of this study has been the development of the open framework which, as discussed, invites future users to apply alternative methodologies to suit their own needs, methodological interests, and axiological assumptions.

Beyond the application of alternative research methods, there are a number of other elements arising from this research that warrants further study. These include the study of a larger sample to confirm the validity of the original results, or the comparison of results between alternative learning activities at the same level of award or delivery. Most notably, there would be great value in exploring the practicalities of implementing the suggested recommendations, and the longer term impact of the suggestions on participant rates, satisfaction and the impact of learning on the individuals' professional and social contexts. This may provide scope to develop a causal model of participation in adult learning that will enhance the body of work in this field.

Finally, it is hoped that the findings of this research, the conceptual framework matrix presented here, and any further research deriving from this study, will contribute towards an up-to-date understanding of participation in adult learning and serve to enhance the current body of work in this field.

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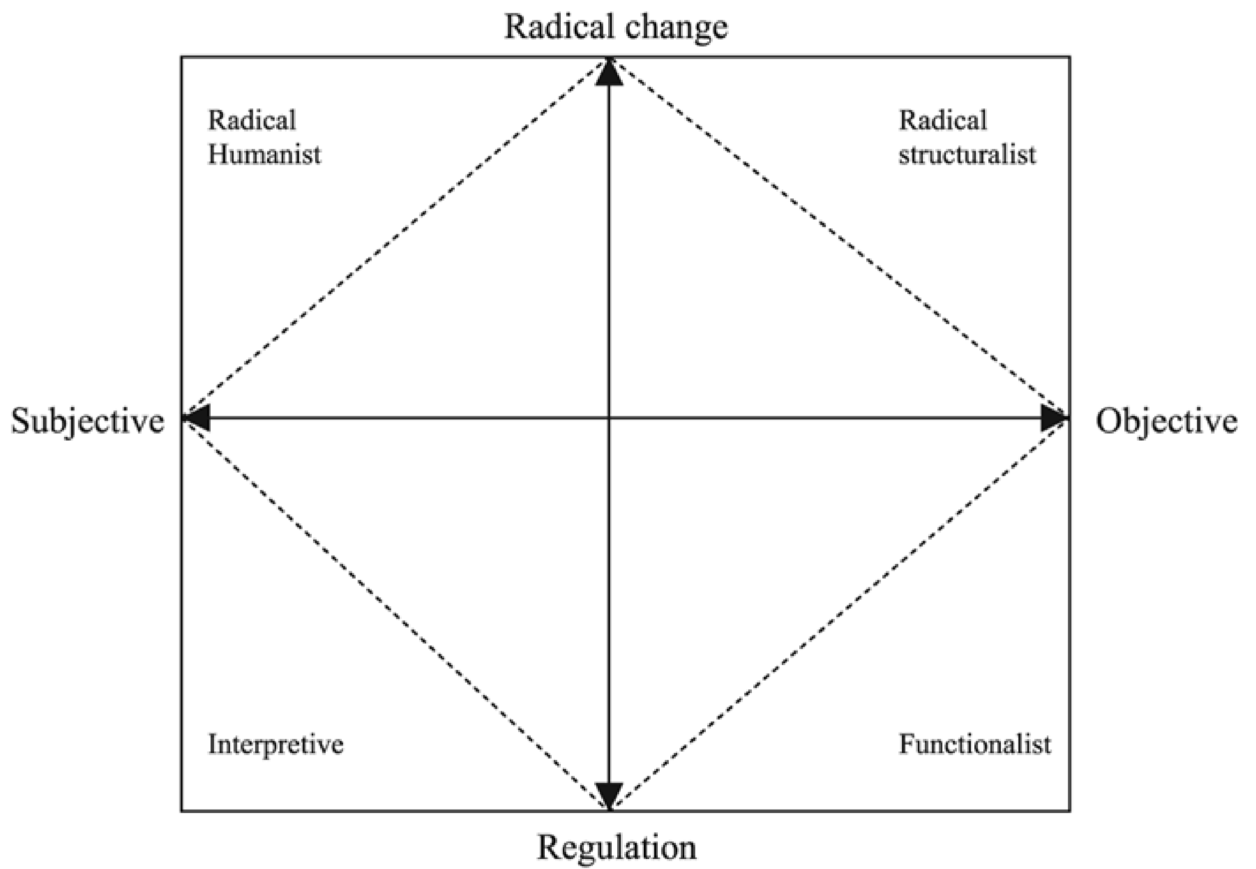
9 APPENDICES

9.1 Characteristics of a Learning Company

Characteristic	Definition
Learning approach to strategy	Company policy and strategy formation, together with implementation, evaluation and improvement, are consciously structured as a learning process
Participative policy-making	The sharing of involvement in the policy – and strategy-forming processes; that is, all members of the company have a chance to take part, to discuss and contribute to major policy decisions.
Informating	The state of affairs in which information technology is used to to inform and empower people rather than, as so often is the case at present, disempower them.
Formative accounting and control	Part of informating, this aspect ensures that systems of accounting, budgeting and reporting are structured to assist learning.
Internal exchange	All internal units and departments see themselves as customers and suppliers, contracting with one another in a partly regulated market economy.
Reward flexibility	The exploration of new, alternative ways of rewarding people. Money need not be the sole reward, and for many people a whole range things may be considered 'rewarding'.
Enabling structures	The creation of opportunities for individual and business development. Roles are loosely structured, in line with the established and and contracted needs of internal customers and suppliers, and in such as way as to allow for personal growth and experiment.
Boundary workers as environment scanners	The collection of information from outside the company. Scanning is carried out by all members who have contact with external customers, clients, suppliers, neighbours and so on.
Inter-company learning	Engagement in a number of mutually advantageous learning activities with customers and suppliers, including joint training, sharing in investment, in research and development and job exchanges.
Learning climate	Managers see their primary task as facilitating members' experimentation and learning from experience. Senior managers give a lead in questioning their own ideas, attitudes and actions.
Self-development opportunities for all	Resources and facilities for self-development are made available to all members of the company – employees at all levels and, ideally, external stakeholders too

Source: Pedler et al. 1991

9.2 Burrell and Morgan’s (1979) four paradigms of qualitative research



Source: Crossan *et al.* (1994)

9.3 Eight Assumptions of Critical Realism

1. The world exists independently of our knowledge of it.

2. Our knowledge of the world is fallible and theory-laden. Concepts of truth and falsity fail to provide a coherent view of the relationship between knowledge and its object. Nevertheless knowledge is not immune to empirical check and its effectiveness in informing and explaining successful material practice is not mere accident.

3. Knowledge develops neither wholly continuously, as the steady accumulation of facts within a stable conceptual framework, nor discontinuously, through simultaneous and universal changes in concepts.

4. There is necessity in the world; objects - whether natural or social - necessarily have particular powers or ways of acting and particular susceptibilities.

5. The world is differentiated and stratified, consisting not only of events, but objects, including structures, which have powers and liabilities capable of generating events. These structures may be present even where, as in the social world and much of the natural world, they do not generate regular patterns of events.

6. Social phenomena such as actions, texts and institutions are concept dependent. We not only have to explain their production and material effects but to understand, read or interpret what they mean. Although they have to be interpreted by starting from the researcher's own frames of meaning, by and large they exist regardless of researchers' interpretation of them. A qualified version of 1 therefore applies to the social world. In view of 4–6, the methods of social science and natural science have both differences and similarities.

7. Science or the production of any kind of knowledge is a social practice. For better or worse (not just worse) the conditions and social relations of the production of knowledge influence its content. Knowledge is also largely - though not exclusively - linguistic, and the nature of language and the way we communicate are not incidental to what is known and communicated. Awareness of these relationships is vital in evaluating knowledge.

8. Social science must be critical of its object. In order to be able to explain and understand social phenomena we have to evaluate them critically

Source: Sayer, 1992, p.5.; 2000

9.4 Survey Instrument

Pages 167 – 178 inclusive

Your Participation in Learning (MS)

1. Welcome

Thank you for agreeing to participate in this questionnaire. I have contacted you following my short project presentation and your subsequent completion of a consent form, signed at Edinburgh Napier University Business School or sent by email.

The purpose of this questionnaire is to find out about your background, to discover your reasons for joining the MSc in Human Resource Management Programme, and to investigate any challenges you may have faced when making the decision to study part time for this qualification. The results of this questionnaire will allow me to make practical suggestions and recommendations for the improvement and development of the programme, and to inform a series of journal articles relating to adult learning.

All of the information gathered from this questionnaire will remain confidential and secure at all times, and your contribution will remain completely anonymous. All participants will be sent a copy of the basic results and will have access to the final write up.

The questionnaire should take you no longer than 20 minutes to complete. Many thanks.

Lesley McLean
l.mclean@napier.ac.uk

2. About you...

***1. Which year of study on the MSc HRM programme have you recently completed?**

- ◯ Year 1
- ◯ Year 2

***2. Gender?**

- ◯ Female
- ◯ Male

***3. Age?**

- ◯ 20 - 24
- ◯ 25 - 29
- ◯ 30 - 34
- ◯ 35 - 49
- ◯ 50 - 54
- ◯ 55 - 59
- ◯ 60+

***4. Do you have any children?**

- ◯ Yes
- ◯ No

Your Participation in Learning (MS)

5. If you answered yes to the previous question, please indicate below the number of children or dependants you have in each age bracket (please use a numeric value eg: 0, 1, 2, 3 etc...). If you answered no, please skip to the next question.

0 - 2 years

3 - 5 years

6 - 11 years

12 - 15 years

16 - 17 years

18+ years

6. Do you have any other dependants?

- Yes
- No

***7. Ethnicity (please tick the appropriate box to indicate your cultural background)**

- White (British)
- White (Irish)
- White (Other White background)
- Mixed (White and Black Caribean)
- Mixed (White and Black African)
- Mixed (White and Asian)
- Mixed (Other mixed background)
- Asian or Asian British (Pakistani)
- Asian or Asian British (Bangladeshi)
- Asian or Asian British (Any other Asian background)
- Black or Black British (African)
- Black or Black British (Caribbean)
- Black or Black British (Any other Black background)
- Chinese or other Ethnic group (Chinese)
- Chinese or other Ethnic group (Any other)
- Information refused

***8. Where do you live?**

- City of Edinburgh
- Midlothian
- West Lothian
- East Lothian
- Central Region
- Fife
- Tayside
- Grampian
- Highlands and Western Isles
- Orkney/Shetland Islands
- Borders
- Dumfries and Galloway
- Argyll and Bute
- Ayrshire
- Strathclyde
- Other (please specify)

Your Participation in Learning (MS)

***9. Please indicate your highest level of education prior to joining the MSc in HRM at Napier**

- School
- HNC/HND
- CIPD Certificate level programme
- Ordinary Degree
- Honours Degree (Business related)
- Honours Degree (Other)
- Post Graduate Degree or equivalent
- Doctorate
- Other Professional Qualification

3. About work...

10. Select one from the following options that best describes the sector you currently work within?

- Agriculture
- Finance and Banking
- Retail
- Health and social care services
- Legal
- Education
- Local Government
- IT/Electronics
- Distribution
- Manufacturing
- Science and Engineering
- Hospitality and Leisure
- Tourism and Travel
- Energy/Utilities
- Transport
- Creative Industries
- Emergency services
- Recruitment
- Voluntary Sector
- Consultancy
- Not currently employed

11. What is your job title?

Your Participation in Learning (MS)

***12. Which of the following descriptions most accurately reflects your role?**

- ◯ Managing Director/Company Owner
- ◯ Director
- ◯ Senior Manager
- ◯ Middle Manager
- ◯ Trainee Manager
- ◯ Officer/Advisor
- ◯ Senior Administrator
- ◯ Administrator
- ◯ Junior Administrator
- ◯ Other (please specify)

***13. How long have you worked for your current employer?**

- ◯ Less than one year
- ◯ 1 to 3 years
- ◯ 4 to 6 years
- ◯ 7 to 10 years
- ◯ 11 to 15 years
- ◯ 16 to 20 years
- ◯ 21 years or more

14. How long have you worked in your current role?

- ◯ Less than one year
- ◯ 1 to 3 years
- ◯ 4 to 6 years
- ◯ 7 to 10 years
- ◯ 11 to 15 years
- ◯ 16 to 20 years
- ◯ 21 years or more

Your Participation in Learning (MS)

15. Approximately how many people are employed within your organisation?

- ◯ 1 - 20
- ◯ 21 - 50
- ◯ 51 - 100
- ◯ 101 - 200
- ◯ 201 - 500
- ◯ 501 - 1000
- ◯ More than 1000
- ◯ I don't know

16. How often is your performance at work evaluated or appraised (eg: Formal appraisal, 360 degree evaluation, interim feedback etc...)?

- ◯ Once per year
- ◯ Twice per year
- ◯ Three times per year
- ◯ Biannually
- ◯ Never
- ◯ Other (please specify)

17. If you do receive performance evaluation, has your involvement in, or progress on, the MSc in HRM at Napier featured within these discussions?

- ◯ Yes (regularly)
- ◯ Yes (occasionally)
- ◯ Never
- ◯ Not applicable

Your Participation in Learning (MS)

***18. Who pays your tuition fees?**

- ◯ Employer
- ◯ Self
- ◯ Employer and Self
- ◯ Other (please specify)

4. Your suitability for the programme

19. Prior to commencing the MSc in HRM programme at Napier, which of the following steps did you take to establish if it was the right programme for you? (please tick as many as are relevant to you)

- ☐ I contacted a current student of the MSc HRM (or equivalent) for information/advice
- ☐ I contacted CIPD head office for information/advice
- ☐ I contacted relevant University staff for information/advice
- ☐ I contacted my professional network for information/advice
- ☐ I researched the subject area on the internet
- ☐ I contacted my local CIPD branch for information/advice
- ☐ I contacted my friends/family for information/advice
- ☐ I researched other programmes on the internet
- ☐ I contacted my work collegues for information/advice
- ☐ I attended an interview with the Napier Programme Leader
- ☐ I researched the qualification on the CIPD website
- ☐ I read the Napier prospectus
- ☐ I researched the Napier MSc HRM on the internet
- ☐ I contacted a graduate of the MSc HRM(or equivalent) for information/advice
- ☐ I attended an open day at the University
- ☐ I read prospectus from other institutions
- ☐ I contacted my Manager/Supervisor for information/advice
- ☐ Other (please specify)

Your Participation in Learning (MS)

20. Prior to commencing the MSc in HRM at Napier, in which of the following ways did you evaluate your suitability for the programme? (Please tick as many as are relevant to you)

- ☐ I compared my qualifications and experience with others who had done or were doing the programme
- ☐ I believed I was in a relevant role at work
- ☐ I compared my qualifications and work experience against published criteria and entry requirements
- ☐ I considered feedback from my peers at work
- ☐ I considered feedback from my perfomance review/appraisal
- ☐ I considered specific results from previous qualifications
- ☐ I submitted additional work requested by Napier and received feedback from the Programme Leader
- ☐ Other (please specify)

5. Joining the MSc in Human Resource Management Programme

Your Participation in Learning (MS)

21. Please indicate on the scale below how strongly you agree or disagree with each of the following statements relating to your own reasons for choosing to participate in the MSc in HRM at Napier.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
As a means of expressing myself	○	○	○	○	○
To gain recognition from others	○	○	○	○	○
As a means of securing employment	○	○	○	○	○
To develop my sense of independence	○	○	○	○	○
I wanted to develop a routine	○	○	○	○	○
To stimuate my brain	○	○	○	○	○
As a result of a significant personal life event (eg: marriage, divorce, having a child etc...)	○	○	○	○	○
To improve my standard of living	○	○	○	○	○
To increase my self-esteem	○	○	○	○	○
To get away from everyday life	○	○	○	○	○
I had no domestic commitments	○	○	○	○	○
To reinforce knowledge gained on the job	○	○	○	○	○
I am competitive	○	○	○	○	○
I had never attended university before	○	○	○	○	○
To improve my reward package	○	○	○	○	○
I was Influenced by my friends/family	○	○	○	○	○
To network with other professionals	○	○	○	○	○
I had nothing else to do	○	○	○	○	○
I had recently graduated and want to take the next step	○	○	○	○	○
To improve my confidence levels	○	○	○	○	○
To improve my job security	○	○	○	○	○
To prove my capabilities to others	○	○	○	○	○
To improve my	○	○	○	○	○

Your Participation in Learning (MS)

employability and promotion opportunities (internally and externally)					
To gain an academic qualification	○	○	○	○	○
To improve my competence and professional awareness at work	○	○	○	○	○
For my own personal development	○	○	○	○	○
The location of the campus	○	○	○	○	○
As a result of a significant work related event (eg: recent promotion, redundancy etc...)	○	○	○	○	○
To build my social group	○	○	○	○	○
To gain a professional qualification	○	○	○	○	○
I had recently moved to the area	○	○	○	○	○
For entertainment/leisure	○	○	○	○	○
I was getting older	○	○	○	○	○
To gain respect from others	○	○	○	○	○
For my own self-fulfillment, satisfaction and achievement	○	○	○	○	○
For general interest/curiosity	○	○	○	○	○
To improve my quality of life	○	○	○	○	○
I had the time to study	○	○	○	○	○
To fulfill organisational objectives/required by my employer	○	○	○	○	○
To improve my credibility at work	○	○	○	○	○

Please indicate here any further reasons that are not mentioned above

6. Barriers to joining the MSc in Human Resource Management Programme

Your Participation in Learning (MS)

22. Please indicate on the scale below how strongly you agree or disagree with each of the following statements relating to the challenges you may have experienced when deciding to participate in the MSc in HRM at Napier.

	Strongly agree	Agree	Neither agree nor disagree	Disagree	Strongly disagree
My personal goals were not clear	○	○	○	○	○
I did not feel ready to learn at post-graduate level	○	○	○	○	○
My employer would not allow time away for attendance	○	○	○	○	○
The qualification would have no effect on my progress at work	○	○	○	○	○
As a result of a significant work related event (eg. recent promotion, redundancy etc...)	○	○	○	○	○
I Lacked confidence	○	○	○	○	○
I was not interested in studying	○	○	○	○	○
I had poor organisational skills	○	○	○	○	○
The qualification would have no effect on my rewards package at work	○	○	○	○	○
I had a lack of support from my colleagues	○	○	○	○	○
I was shy	○	○	○	○	○
There was a lack of information available on learning opportunities	○	○	○	○	○
I had a fear of the unknown	○	○	○	○	○
I doubted my own ability	○	○	○	○	○
I had little free time to study	○	○	○	○	○
I had a fear of competition/competitiveness	○	○	○	○	○
My organisation did not support professional education	○	○	○	○	○
I found it difficult to arrange childcare	○	○	○	○	○
I was not interested in the subject area of HRM	○	○	○	○	○
The content or structure of the programme did not meet my needs	○	○	○	○	○
My friends and family disapproved of the idea	○	○	○	○	○
There was a lack of funding	○	○	○	○	○

Your Participation in Learning (MS)

to pay my tuition fees

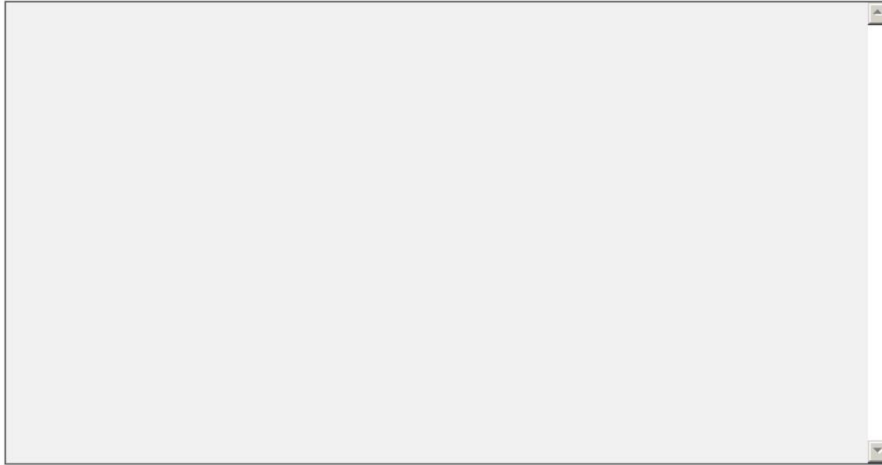
I felt too young/too old to study at this level	◯	◯	◯	◯	◯
I had health problems	◯	◯	◯	◯	◯
I had Low self-esteem	◯	◯	◯	◯	◯
The application process put me off applying	◯	◯	◯	◯	◯
I suffered from anxiety/nerves	◯	◯	◯	◯	◯
It felt like too much of a risk	◯	◯	◯	◯	◯
I had not been involved in formal education for some time	◯	◯	◯	◯	◯
As a result of a significant life event (eg. marriage, divorce, having a child etc...)	◯	◯	◯	◯	◯
I did not have support from friends and family	◯	◯	◯	◯	◯
I had domestic commitments	◯	◯	◯	◯	◯
I did not hold the standard entry requirements	◯	◯	◯	◯	◯
I found it difficult to get to the campus	◯	◯	◯	◯	◯
I was not working in an HR related role	◯	◯	◯	◯	◯
My employer would not allow time away for studying	◯	◯	◯	◯	◯
My employer would not pay my fees	◯	◯	◯	◯	◯
I had a lack of support from my Line Manager	◯	◯	◯	◯	◯
I had a negative experience of education in the past	◯	◯	◯	◯	◯
I had a fear of rejection	◯	◯	◯	◯	◯

Please indicate here any further barriers or hurdles you experienced that are not mentioned above

7. Finally...

Your Participation in Learning (MS)

23. I am particularly interested in the story behind your journey on to the MSc in HRM at Napier. Each of you will have been influenced by different people around you and have a variety of reasons for choosing to participate in the programme that are unique to you. If you are willing to share your story, briefly or in depth, please use the space available below.



8. Thank you for completing this questionnaire

Many thanks for taking the time to complete this questionnaire, your support is very much appreciated. For those of you who have agreed to be contacted about the possibility of participating in a follow up interview, I will be making contact towards the end of the summer.

Thank you once again,

Lesley McLean
l.mclean@napier.ac.uk

9.5 Interview Structure (Form)

Name	
Date	
Time	
Name of Audio File	

Theme 1: Context of Participation and the decision to participate (before programme) Key Question: I'd like to talk about the context surrounding your decision to join the programme – what was going on in your life at the time? Key Question: What were your reasons for choosing to apply for the programme? Probe: What motivated you to apply? Personal, practical, psychological, professional factors? What were you hoping to gain? Support mechanisms at this stage?
Theme 2: Challenges and barriers to participation Key Question: Did you experience any obstacles or challenges at work that you had to overcome before applying for/joining the programme? Probe: Personal, practical, psychological, professional factors?

Theme 3: Enabling and Restricting Factors (during programme) Key Question: Once you had made the decision to participate and had been accepted, what would you consider to be the key sources of support that enabled your continued participation? Probe: Work, University, family, friends, colleagues etc...? Key Question: Were there anything in place at work to support your ongoing participation? Probe: Were there any sources of support missing that you would have found useful? Could they have done anything differently? Key Question: Did you experience any challenges or barriers during the programme that restricted your ability to engage with the programme?
Theme 4: Ideas and recommendations for change Key Question: what do you think anything could have been done to further support you before and during participation in the programme? (university, work, colleagues, friends, family etc...) Key Question: If at all, In what ways do you think your employer and the university could work together to enable and support engagement in the programme?

What are your final comments on the general experience of doing a programme such as this whilst working full time.
Any other thoughts or comments you would like to make regarding any of the areas we have covered?
Possible coding themes and thoughts

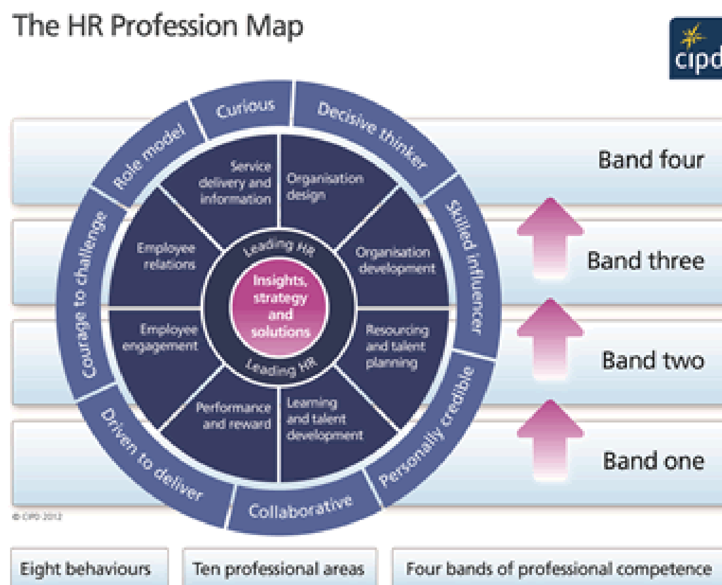
9.6 CIPD Membership Information

In 1994, the Institute of Personnel and Development (IPD) was formed through the merger of the Institute of Personnel Management with the Institute of Training and Development. Following this chartered status was achieved in 2000, and the CIPD in its current form came into existence. The wider remit of the Institute includes influencing policy in within UK Government, engaging with leaders and the wider business environment, undertaking, commissioning and distributing HR and business related research, and producing conferences, exhibitions and awards events. In 2003, the CIPD awarded chartered status to over 37,000 full Members, Fellows and Companions of the Institute, with current membership levels now standing at 135,000. Entry to the Institute has been restricted since 1955, whereby the full membership of the Institute was via examination and an education scheme which was administered externally by colleges in preparation for the Institutes national exam. This has developed over the years with the national assessment being complimented by approved diploma programmes being offered by universities (as in the case of this research site), and the more recent addition of 'Experience Assessment' launched in 2010.

The Institute has moved on in recent years to acknowledge individual development needs and their impact on organisational competitive advantage. 'In our rapidly changing and increasingly knowledge based economy, competitive advantage is built where individuals actively seek to acquire the knowledge and skills that promote the organisations objectives. Organisations are learning environments, and employment in them is (or should be) a continuous learning experience.' (CIPD, 2007)

In 2009, the Institute introduced the 'HR Profession Map' designed to aid members in identifying areas of professional development and covers the three key areas members are required to demonstrate and develop. The three areas are *knowledge*, generally achieved through a CIPD qualification, and *activities* and *behaviours* demonstrated by professional competence and achievement. Chartered membership, at all levels (Associate, Member, Fellow), requires evidence of each of these areas, with the requirements building at each level as

an individual progresses in their career. Membership levels and routes have been developed in line with the changing philosophy of the CIPD which aims to support individuals, organisations, and the profession as a whole in the sustainable development of HR capability. Completion of the aforementioned degree provides the *knowledge* indicators for full chartered member level, and students are encouraged to upgrade to the appropriate membership grade, dependent on their own experience, on completion of the degree.



9.7 Consent Form

Edinburgh Napier University

Doctor of Business Administration

Research Consent Form

Name and contact details of Researcher: Lesley McLean, Room 2/38, Craiglockhart Campus, Colinton Road, Edinburgh, EH14 1DJ. Email: l.mclean@napier.ac.uk Tel: 0131 455 4359

Please initial box

I confirm that I have read and understood the information slides for the above study and have had the opportunity to ask questions	☐
I understand that my participation is voluntary and that I am free to withdraw or refuse to participate at any time without giving reason.	☐
I am aware that whilst every effort will be made to maintain confidentiality of the information I provide, this can only be offered within the limitations of the law	☐
I consent to be contacted by email in the following stages of the research	
1. for the purpose of the above mentioned research student questionnaire	☐
2. for the purpose of the above mentioned research student interviews/focus groups	☐

You may be contacted regarding this research out with the teaching period, please provide an email address that you check regularly.

Name of Participant:

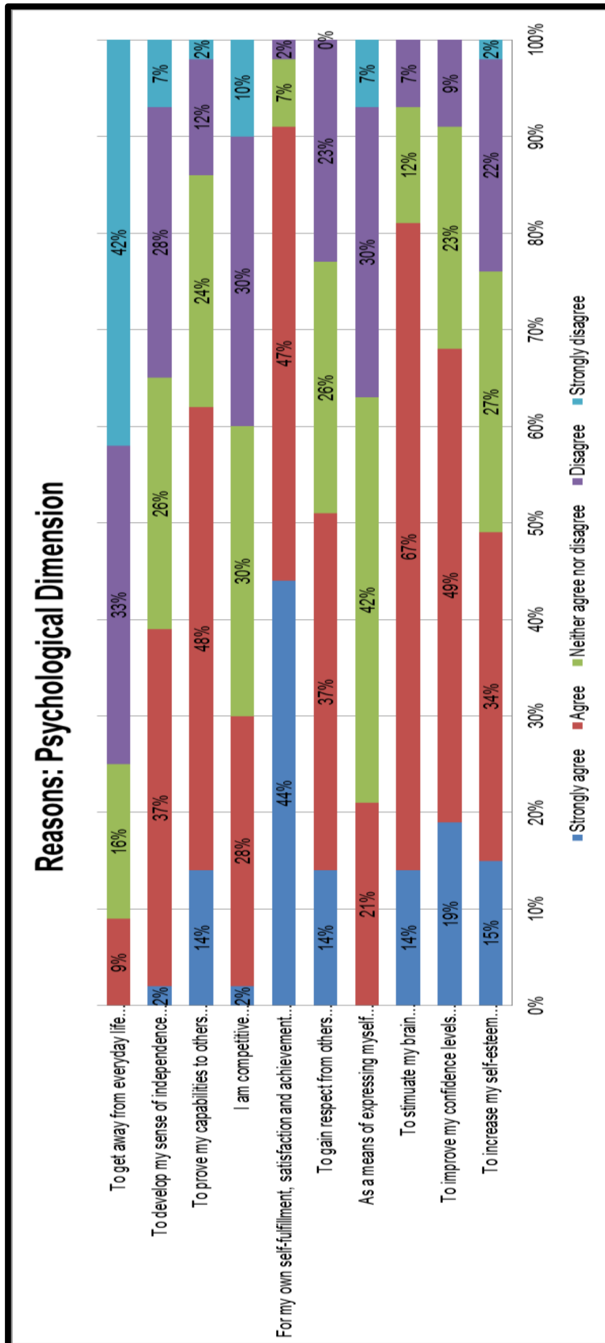
Date: Signature:

Lesley McLean (Researcher): I accept that the ethical responsibilities surrounding this study are my own and cannot be transferred to any other individual or body.

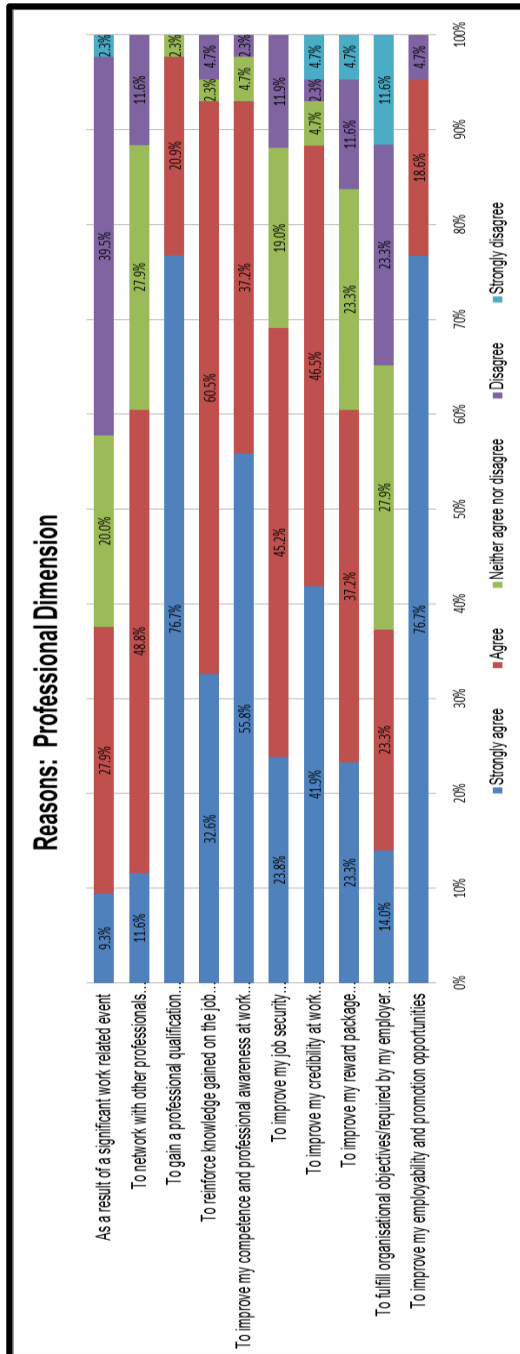
Date: Signature:

9.8 Stacked Bar Charts (Real Value Results)

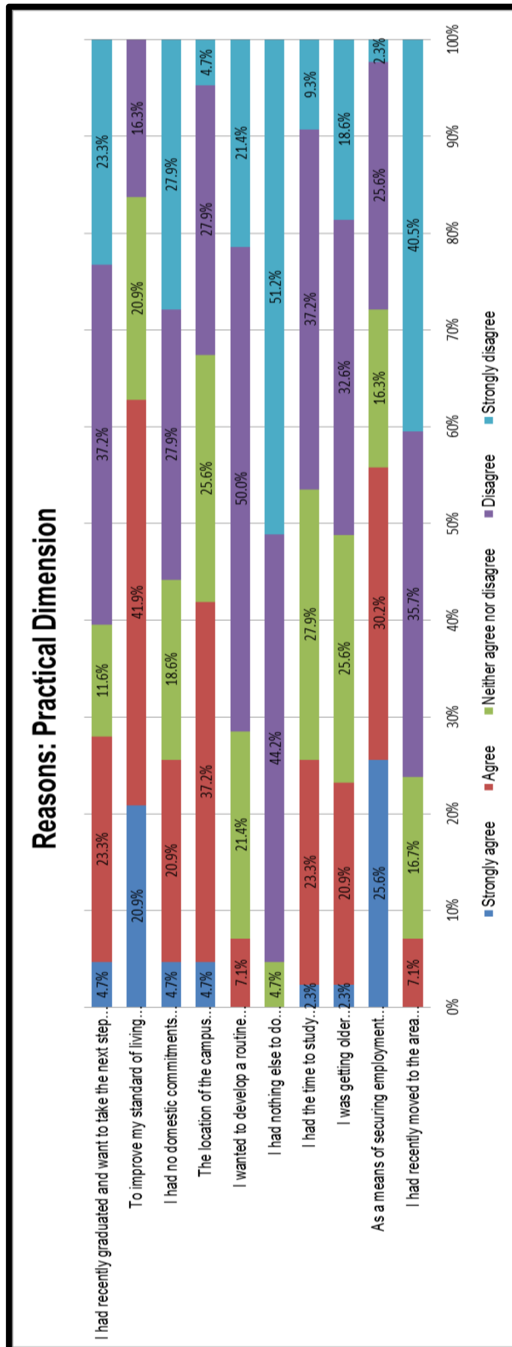
9.8.1 Psychological Reasons



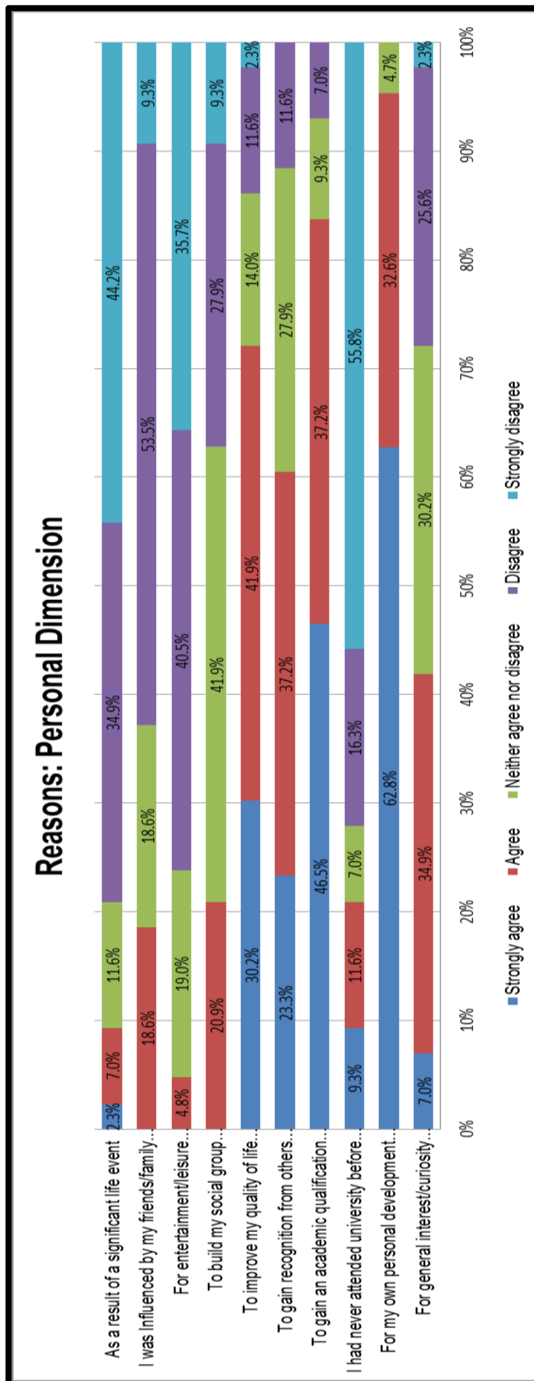
9.8.2 Professional Reasons



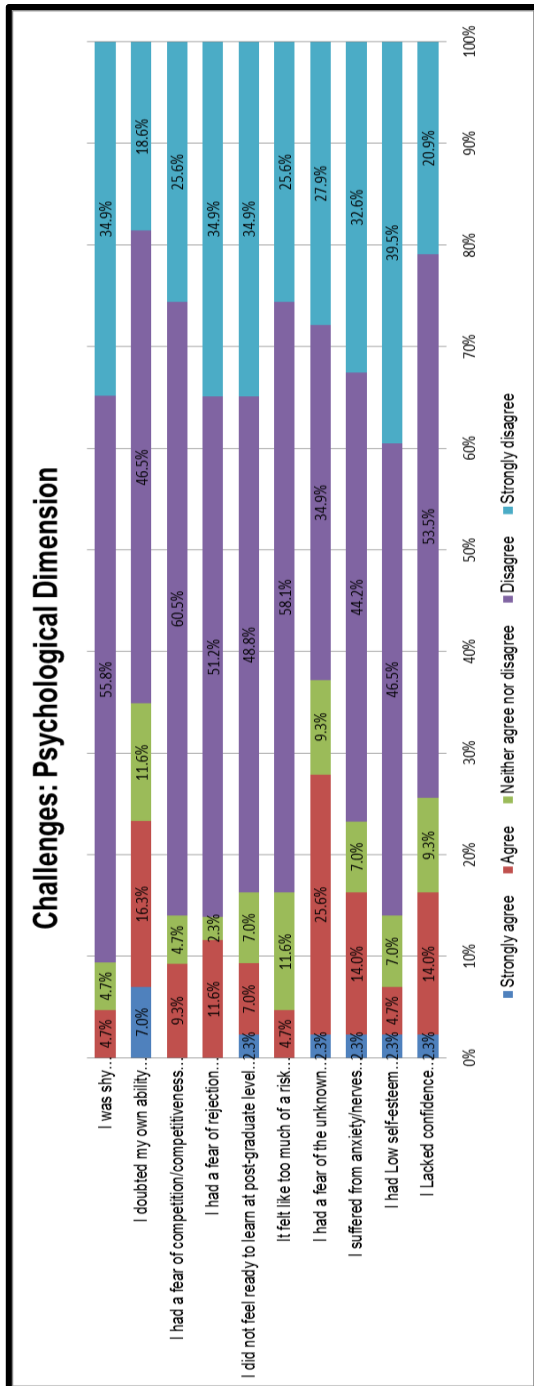
9.8.3 Practical Reasons



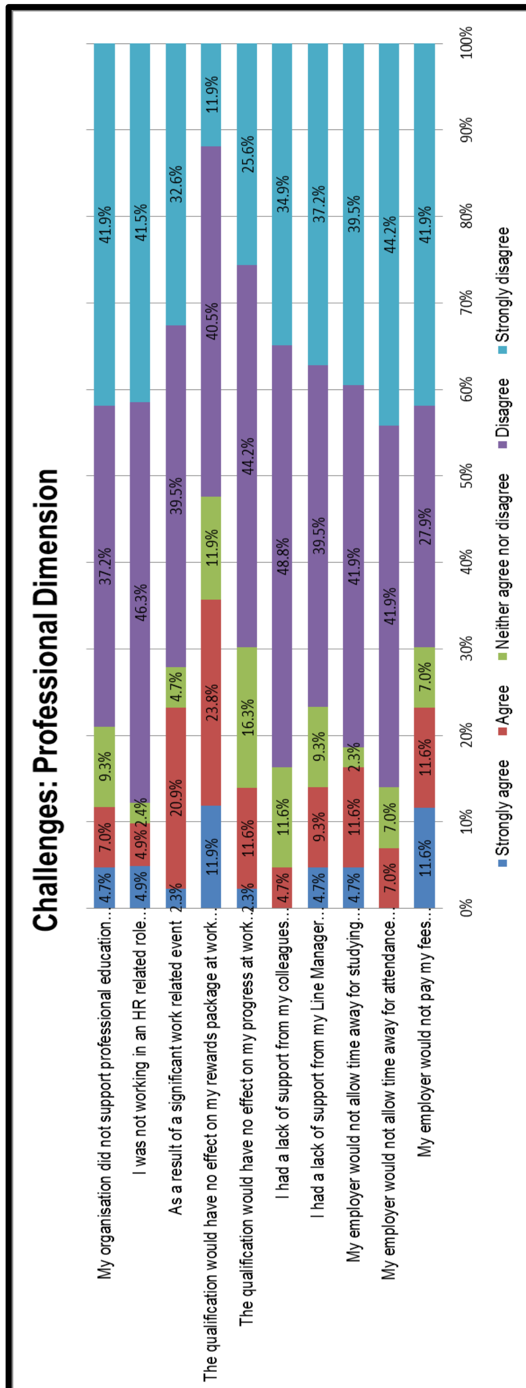
9.8.4 Personal Reasons



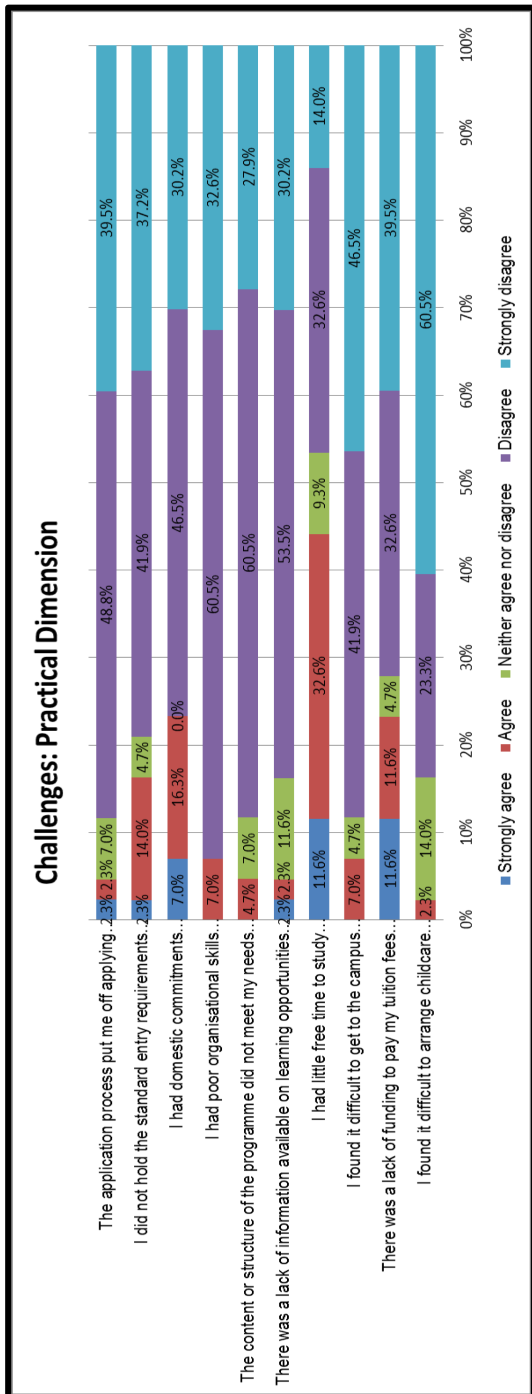
9.8.5 Psychological Challenges



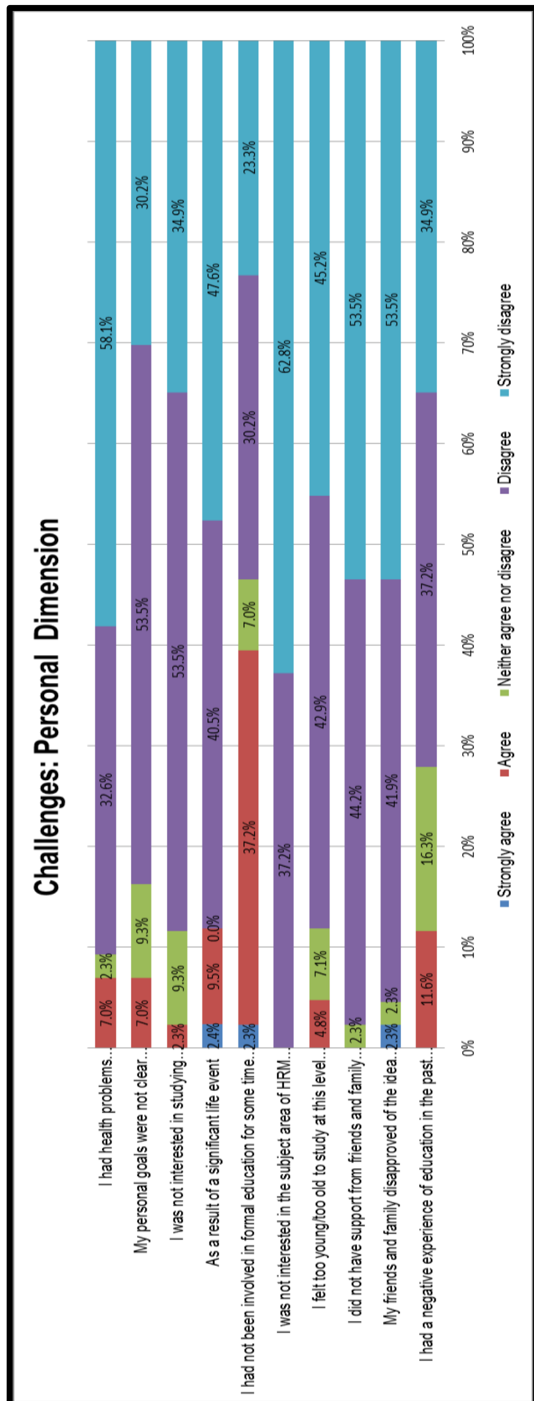
9.8.6 Professional Challenges



9.8.7 Practical Challenges



9.8.8 Personal Challenges



9.9 Overview of Bridging Programme

The Bridging to Masters programme is a fast–track progression route to a Masters degree without having to study for an undergraduate degree first. Participants have a minimum of five years' relevant work experience, but no formal qualifications are required. Each application is considered on an individual basis.

The course consists of three modules: Effective Learning, Leadership & Creativity and Work-Based Learning - each worth 20 academic credits. The first two modules are predominantly class-based in workshops and tutorials where participants are invited to share insights and workplace experiences. Effective Learning helps develop the range of skills needed for continued personal development and for completing a Masters degree. Leadership & Creativity introduces these topics, some of the associated theories and how to apply them. The Work-based Learning module is undertaken entirely in the participants own workplace and involves a topic agreed with the employer. This module builds on experience using personal or work-based assignments that will benefit both the participants and their employer by demonstrating knowledge and understanding and providing evidence of competence within the organisation. A variety of assessment methods are used.

At the end of the programme, participants can apply for the MSc HRM (or any Master's degree within the business school with the exception of the MBA) or can leave with a certificate of completion and 60 academic credits. The course commences in mid-September and is held, for the first trimester, one evening a week (on Tuesdays). The second trimester requires only three sessions on campus. The rest is independent or work-place learning.