FROM REACTIONARY TO RESPONSIVE: APPLYING THE INTERNAL

ENVIRONMENTAL SCAN PROTOCOL TO LIFELONG LEARNING

STRATEGIC PLANNING AND OPERATIONAL

MODEL SELECTION

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This study describes and implements a necessary preliminary strategic planning procedure, the Internal Environmental Scanning (IES), and discusses its relevance to strategic planning and university-sponsored lifelong learning program model selection. Employing a qualitative research methodology, a proposed lifelong learning-centric IES process based on Bryson's (2004) strategic planning model was tested at a large public university in the American Southwest with the intention of both refining the IES process for general use in the field as well as providing a set of useable reference documents for strategic planners at that university.

The prototype lifelong learning IES process as tested proved to be highly effective in identifying and categorizing previously unrecognized lifelong learning programming and organizational structures and, was reasonably efficient in process execution. Lessons learned from the application of the prototype lifelong learning IES procedure led to the development of a revised scanning procedure. This revised procedure is considered more reliable and can be accomplished by a single investigator in as little as 35 production hours, providing a detailed snapshot of the total university lifelong learning system and a point of departure for the larger strategic planning effort.

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CHAPTER 1

INTRODUCTION

Background

"Contemporary society is necessarily a learning society. Only successful individuals, organizations and nations figure, or count in such a culture, and to be successful requires a commitment to lifelong learning" (Bagnall, 2001, p. 42). But what, exactly, is lifelong learning? It goes by many names: lifelong learning, continuing education, non-credit learning, and adult learning, just to name a few.   Huey B. Long discusses the impreciseness of the construct and notes that while widely used, and with great license, there has been almost no effort to enjoin professionals to agree on the terms of its use (Long, H., 1983).

The context of lifelong learning within this paper addresses only that adult learning programming which is considered formal, typified by traditional school and university learning described by Coombs and Ahmed (1974). In turn, this formal learning methodology is associated with a concept of adult learning processes as presented by Tough (1971), which states that formal lifelong learning is an ongoing process, approached as a deliberate action by adults, to acquire predetermined knowledge and/or skills, in a formalized learning environment, for a specific purpose.

The term lifelong learning *programming* as used within this paper reflects the paradigm described by Knapper and Cropley (2000) as the process of providing adults formal education opportunities through a set of defined organizational, administrative, and methodological procedures that seek to promote and deliver lifelong learning to adults outside of the traditional degree-granting organization.

The demand for expanded, relevant, and more responsive non-credit lifelong learning programming can be expected to grow over the coming decades as individuals and organizations respond to dramatic technological and cultural change. However, many established lifelong learning delivery organizations maintained specifically to provide this programming to adult learners may not be conceptualized and structured to meet challenging programming demands of twenty-first century adult learning populations.

It can be argued there are three specific forces that will continue to drive demand for non-degree credit student programming: the rapidity and constancy of technological and cultural change; occupational obsolescence; and change in individual lifestyles and value systems (Hiemstra, 2002). In order to ensure responsiveness to adult learning needs in the twenty-first century economic and cultural environments, lifelong learning delivery organizations must adopt the practice of anticipating operational change. Using established models of strategic planning and process improvement, organizations can develop consistently relevant programming through the systematic application of a recognized lifelong learning modeling process rather than a reactionary response to perceived learning trends.

While lifelong learning programs within the United States enjoy a new visibility and vitality on campuses and communities across the country, they are just the present iteration of adult, non-degree learning programming that has existed since this country's colonial period and which has naturally evolved and expanded as the needs of learners have changed and broadened over the decades.

Likewise, the list of lifelong learning providers has grown and diversified over

time to meet needs of specific adult learner populations. Presently, organizations

operating specific lifelong learning structures to provide adult, non-degree credit

learning services range from church groups and city community centers, private non-

profit organizations and proprietary schools, business and industry schools and, of

course, the formal education hierarchy: secondary schools, community colleges, four-

year colleges and universities.

All providers of adult-centered learning activities, regardless of organizational

type, will have a necessary part to play in meeting increasing and changing learner

expectations and demands of lifelong learning programming. Institutions of higher

education in particular, because of their high visibility within the community and with the

expert theoretical and research resources resident on their campuses, must be

prepared to assume the leadership role. This role includes the determination and

analysis of projected lifelong learning needs based upon scientific study of

contemporary lifelong learners and the development of associated lifelong learning

assessment tools and programming models. In addition to the research role, most

public universities within the United States maintain an organizational unit dedicated

specifically to providing lifelong learning activities to their served community. However,

unlike a university's traditional degree-credit colleges and departments that generally

follow the same model from coast to coast, university-sponsored lifelong learning units

tend to be institutionally unique and their approach and dedication to the lifelong

learning mission varies greatly from institution to institution.

Unlike British and European lifelong learning delivery programs, which tend to be

governed centrally and focused primarily on workforce training, university-sponsored

lifelong learning in the United States has developed a distinctly entrepreneurial orientation. For the most part, contemporary university-sponsored lifelong learning units emerged during the 1960's and 1970's in what was commonly known as the "Free University" or a "Skills Exchange" (Knapper & Cropley, 2000). Hardly the Free University of their origins, contemporary university-sponsored lifelong learning systems within the United States are primarily organized to focus on the pursuit of unrestricted revenue through student enrollments rather than understanding and meeting learner needs (Long, H., 1983). However, while university-sponsored lifelong learners and program goals have changed over time, their foundational models have not. Because of this, many university programs are unlikely to be organized in a manner readily responsive to the anticipated demands of a growing, more diversified population of 21st century lifelong learners.

Rather than aligning organization and programming against a more sophisticated program model, many established programs merely tend grow, incorporating apparently successful packages of their peer institutions into their own lifelong learning program packages. This reactionary, evolutionary approach toward lifelong learning organization and program development inherently assumes an after-the-fact response to change (Long, H., 1983). The rate of anticipated technological and social change will soon deem this traditional approach unresponsive to learner needs, impractical in implementation, and inefficient in delivering a reasonable return on investment to the sponsoring institution (Carnevale, 2001).

Originally, most non-degree seeking adult learners participating in late twentieth century university-sponsored lifelong learning programs primarily sought a structured

source for intellectual stimulation and personal enrichment within an informal, social atmosphere. The Free Universities and Skill Exchanges filled this niche quite adequately. Then, beginning in the mid-1980's, the commercialization of advanced data processing and communication technologies, and their incorporation as personal productivity and/or enrichment tools within the general population, led naturally to a widespread perceived need for not only personal enrichment programming but also a demand for technical education, career development training and advanced professional courses.

The expected, rapid evolution of technologies within information/knowledge management, mass and personal communication, bio-molecular sciences, and global economic and environmental circumstances of the 21st century will broaden the needs of learners even further requiring an even larger course inventory and more student-centric educational support systems. Relentless changes will require almost all individuals to seek formal educational upgrades for both workforce knowledge and skills and for personal lifestyle maintenance and emotional well-being throughout their lifetimes. Beyond the obvious career and interpersonal impact of anticipated change, the ontological paradigm shifts generated through the individual and possible symbiotic relationships of these technologies will create unforeseen challenges to individual and societal understanding of the physical world, personal lifestyle expectations, and the progression toward those lifestyle goals, and the eventual realization of self-actualization (Drexler, 1991). Adults will naturally look to the university to provide them more authoritative knowledge and skills to cope with this more personal, psychological response to change.

To meet the needs of current and future lifelong learners, university lifelong learning programmers need to consider initiating a comprehensive assessment of their existing organizations and programming in conjunction with a process of program reengineering based upon an institutionally appropriate, purpose-driven lifelong learning strategic planning model. The findings and direction provided through the comprehensive strategic planning process can, in turn, inform the adoption of a mission appropriate lifelong learning programming model.

Recognizing the organizational and programming evolution going on within lifelong learning programming, Peterson (1979) and a handful of adult learning scholars during the 1970's and early-1980's offered their perspectives on lifelong learning program modeling (Long, H., 1983). Essentially, all of these models followed a similar concept: focus on executing a specific sequence of procedures addressing issues of need or interest, topic development, goal setting, resource identification, instructional techniques and program execution (Long, H., 1983). The core concepts of these models remain relevant today. However, a feature common to all of these programming models is the implicit assumption that programming is developed from a clean-slate start. Lacking in these models is the recognition that most universities within the United States have a long-existing lifelong learning program or programs that were conceived and made operational prior to the development of these more contemporary, sophisticated lifelong learning models. The mere adoption of a lifelong learning model is insufficient in itself, it must be preceded by a deliberate assessment of the institutions current lifelong learning effort and the operational environment in which that effort takes place. The results of this process can then provide a comprehensive data set to be

used by the institution in the development of a strategic plan that will, through its resulting vision, mission, and goal statements, inform the selection of a mission appropriate operational lifelong learning model.

While lifelong learning specific program models may not address consideration of the critical organizational and environmental factors in effect as a specific implementation step, most models of strategic planning not only address this issue but also identify this initial research step as a crucial initial procedure in achieving institutional effectiveness. As with lifelong learning programming models, there are more than a few models of strategic planning identified in the literature. Unlike lifelong programming models, which primarily address programming procedures and operations, strategic planning models are more generalized in application and are primarily designed as a blueprint for reengineering an organization. To become effective learning organizations in the 21st century, lifelong learning units must recognize the need for both a planning process to develop a strategic vision and the adoption of a programming model that complements that vision. This study attempts to develop a lifelong learning specific strategic planning environmental scanning protocol and, through the process of identifying and demonstrating the protocol, develop a practical single source of lifelong learning organizational and programming data set which can be used by the leaders and planners at Southwestern University in the development of a lifelong learning strategic plan.

Strategic planning originated primarily as a business and industry model for process improvement; however, not-for-profit institutions have often successfully incorporated its tenants and procedures into their organizational culture.   During the

early 1990's U. S. Army planners adopted the strategic planning process as policy and described the application of this process long-range planning in their field manuals. In a similar manner, the U.S. Navy, NASA and the Department of Homeland Security institutionalized the strategic planning processes within a not-for-profit paradigm. U.S. Army planning field manuals specifically address the crucial initial planning step of identifying current operational and environmental factors, referring to this process as "situational awareness" (Army Field Manual 1-02, 2004).

The term situational awareness is also a commonly used within the context of psychology as one of many human cognitive processes. Simply, it means knowing what is going on around you. Within the psychological context, the term generally refers to the responsive behaviors of an individual coping within a specific environmental situation based upon their awareness of the individual factors contributing to the particular situation. A broad definition of the term provided by Endsley and Garland (2000) lends itself well to application at the institutional level as well: "a set of environmental conditions and systems states with which the participant is interacting that can be characterized uniquely by a set if information, knowledge and response options" (Endsley and Garland, 2000, p 34).

John Bryson (2004) operationalizes the concept of situational awareness more specifically as a planning tool for non-profit institutions of higher education through a process he refers to as "environmental scanning." The term situational awareness used by the mentioned governmental agencies takes into account both internal and external factors affecting the organization's interactions within its operating environment. Bryson (2004) in his approach to non-profit strategic planning splits his processes of

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environmental scanning into two distinct procedures of exploration; scanning external of the organization in order to identify opportunities and challenges, and an internal scan, which is designed to identify the organizations strengths and weakness.

This research study is conceptualized to identify, gather, and organize only the internal environmental factors on a single university's existing lifelong learning system. The information and knowledge gained through this Internal environmental scanning (IES) procedure, coupled with a separate, parallel external scanning process could provide the critical strategic planning reference data needed by institutional planners regarding organizational structures, internal competitors, current programming, and served learner characteristics. This procedure would provide a snapshot of the unit's internal operational environment and provide the baseline data, to contribute to the development of a strategic plan that addresses the institutional visions and goals specifically to serve non-degree seeking lifelong learners. Ideally, the resulting strategic plan would have clearly defined structures and boundaries of the lifelong learning mission, the university's vision of the populations served, the program's educational objectives, and the operational goals of the program. In turn, the products of this strategic plan would then be used to inform planners and program coordinators of the most appropriate lifelong learning program model to adopt and adapt based on these resulting institutionally defined lifelong learning missions, visions, and objectives.

Because each university lifelong learning unit in the United States is relatively unique in its program objectives, organizational structures, process management systems, terminology and program offerings, it would be very difficult to describe a broadly generalizable standardized process for the conduct of the IES procedure.

Instead, this study investigates and reports on the design and implementation of the IES procedure at a single large public university in the American southwest, which for the purpose of this study, is referred to as "Southwestern University."

Senior administrators at Southwestern University have recognized that the lifelong learning unit is due for a comprehensive assessment and likely, a major program restructuring; however, no specific guidance has been provided about the procedures this evaluation and restructuring should follow.

There has been no comprehensive, systematic review of the university's lifelong learning programming in its 38-year history. There is no single-source document identifying the numerous lifelong learning programs operating independently of the designated lifelong learning programming unit, nor the relationships these independent programs have to the university's overall missions and visions, and/or a lifelong learning service objective. An informal, preliminary review of the university's lifelong learning organizations, delivery systems, served populations and program offerings appears to describe a system that is unnecessarily ill defined, complex and reactionary.

Existing lifelong learning programming offered by units other than the designated, branded lifelong learning provider have not been considered for integration into the envisioned restructuring effort, nor has a demographic study of affected lifelong learners been considered. Before such a significant reengineering effort is initiated, administrative leaders and planners should have access to a comprehensive survey of the university's existing lifelong learning systems and programming, providing a descriptive, systematic base of relevant data. The process of collecting and describing this baseline data demonstrated by this study provides one example of the conduct of a

university-sponsored lifelong learning program internal environmental scan. The results of this IES procedure are intended to support the process of strategic assessment and planning and in turn, inform the selection and integration of an appropriate lifelong learning model into the university's lifelong learning programming system.

Problem

Contemporary lifelong learning programming models have been designed to provide practitioners within the field a useful framework for grounding their unit's mission, defining their organizational structures and programs to support the stated university mission, and to continuously evaluate program effectiveness at meeting adult learner needs. However, these models assume a clean-slate application of associated processes and procedures and do not address the unique operational environments of long-existing units that influence the selection and effective application of a mission appropriate model. The formal application of strategic planning processes has been demonstrated to be an effective tool in creating a fresh point of departure for new or improved business methods while acknowledging and addressing past and present operational relationships and environmental forces affecting desired organizational change. A set of accurate data describing the organizations existing environment, support structures, process and products are critical to the initiation strategic planning. Bryson (2004) defines this data collection and organization process as environmental scanning, which he further sub-categorizes into processes of internal and external scanning.

Can the internal environmental scanning (IES) process described by Bryson

(2004) and others be effectively and efficiently tailored to the unique organizational structures of a long-existing university-sponsored lifelong learning program and produce a single-source reference document that contributes to the development of a comprehensive lifelong learning strategic plan?

Purpose of the Study

The purpose of this descriptive case study is to identify the specific IES processes relative to lifelong learning programming and determine if those processes are adequate to collect, classify, and organize data describing the university's diversified lifelong learning programming data into a single-source document describing the internal organizational and programming environment. Secondly, the resulting institution-specific data documents developed through this investigation of the IES procedure at Southwestern University are intended to be used in practical application by administrators and planners in the development of a unified lifelong learning mission, vision, and strategic plan. In turn, the results of the strategic planning process, supported through this implementation of the IES, are expected to inform the selection and implementation of a formal lifelong learning program model appropriate to serving the needs of 21st century adult learners within the university's service area.

This IES procedure is conceived as a procedural prototype designed to identify, describe, and categorize all of the various lifelong learning activities sponsored by campus units within this large, public university in the American southwest and conducted during the most recently completed Academic year 2007-08. Lifelong learning providers are identified, as are each provider's primary university mission,

lifelong learning program descriptions, lifelong learning program objectives, targeted learner population(s), staffing, and program structures dedicated to the lifelong learning effort. Additionally, annual student registrations and revenues are recorded and linked to the assigned providing unit. Learning activities have been classified and sorted to determine whether they share all of the characteristics of formal, non-credit lifelong learning programming as defined in this paper. Units meeting the criteria of a defined lifelong learning programming provider are identified and graphically mapped organizationally, coupled with a brief description of their learning program(s) and net revenues.

Lastly, the IES modeling procedure identifies and defines the discrete lifelong learning population(s) currently served by each of the individual lifelong learning programming providers, then link each of those populations to one or more distinct and defined programming categories.

As the IES procedure is considered a prototype under evaluation, a secondary purpose of this study was to describe and report on the specific process steps, planned and emergent, in the IES modeling procedure in order to refine and improve the process.

Research Questions

A review of the campus activities calendar indicates that many campus units, not specifically identified as lifelong learning providers, are conducting open enrollment, non-degree credit adult learning activities to the served community.

Research Questions 1 through 8 are sequential and complementary and

designed to produce a set of practical data documents. Each question was directly linked to one or more of 18 individual data field titles in the consolidated lifelong learning database. Once captured and filtered, the resulting data provides for custom reports which can be used to identify the various campus units providing lifelong learning program as defined within this study.

Question 9 addresses the EIS procedure itself and was designed to capture data on the application of the internal scanning process in order to evaluate the efficiency and effectiveness of this prototype procedure, providing information that results in recommendations for IES process improvement

1. Which campus units, not specifically identified as the designated open enrollment, non-degree credit learning provider conducted not-for-degree-credit learning activities in Academic year 2007-08?

2. From the list of all units providing open enrollment, non-degree credit learning activities uncovered through the processes of Research Question 1, which units are providing programming as operationally defined in this paper as lifelong learning programming, retaining staffing and organizational structures to support those activities as a unit mission?

3. For those units identified from the process results of Research Question 2, is lifelong learning programming a primary or secondary mission?

4. What was the learning activity provided?

5. What was the learning objective of the activity?

6. How can the characteristics of the population participating in the learning activities best be described?

7. From this list of units, providing open enrollment, non-degree credit adult learning activities, what activity fees are associated with each activity, and how much annual revenue is generated?

8. From the list of units assuming lifelong learning programming as an organizational mission, what staffing requirements are necessary to meet adult learner-centric service needs for the sponsored lifelong learning activity; what organizational and material structures exist to support this lifelong learning programming?

9. What are the emergent, secondary procedures necessary to conduct the IES pre-strategic planning data collection procedure?

Significance of the Study

Like many of its peer institutions, the designated lifelong learning programming unit of the studied large public university has evolved reactively to perceived trends in adult non-degree credit education. Originating in the late 1970s from a "Free University" model, it has diversified from its initial core of personal enrichment courses in liberal arts, fine arts, and recreation to an organization of several departments with independent educational objectives, all established without any deliberate, long-range plan. During this evolutionary period, programming philosophy shifted from that of a community service providing educational activities for a nominal fee to cover course expenses to that of a purposeful revenue-generating unit, contributing unrestricted general funds to the university. It was expected that the results of this study would provide the data necessary to support the development of a strategic plan supported by the university's senior administrators and, in turn, the adoption of a program model that

accounts for the broader range of current student needs and interests along with a stated revenue-generating mission for the lifelong learning unit.

Throughout the designated lifelong learning programming unit's expansion period, other campus units, both traditional degree-granting departments and auxiliary university units, designed, developed, and conducted lifelong learning programming independently and without lifelong learning coordination at the executive level. In some cases, these activities were offered in direct competition with the designated lifelong learning programming unit. This research identified those units and describe their activities for those administrators and planners tasked with defining and organizing the university's lifelong learning mission.

This research documented and evaluated the process steps of the IES procedure for follow-on refinement, for efficiency of application and generalization for the use by other existing university lifelong learning units considering program reengineering.

Institutionally specific findings resulting from the test and evaluation of the IES gives educational planners within Southwestern University the baseline data from which to develop a flexible, learner-oriented lifelong learning system for the future through a formal follow-on process of strategic planning. The resulting documents provides a common historical background of existing systems, standardized lifelong learning programming terminology, and descriptions of current organizational structures. It provides a baseline of categorized learning activity data sorted by the providing university units and their associated learner demographic grouping(s).

This study's finalized documents are intended to directly support a university strategic planning process that provides policy and direction that is forward-looking and

responsive to change. A strategic plan that is oriented towards a lifelong learning

programming that is learner-centered, responsive to non-degree credit learner needs,

and employs the forces of change to its financial advantage.

Further, the findings of this study suggest the need for additional research in both

university-specific and generalizable studies in the areas of lifelong learning program

assessment, defining university missions and roles in adult, non-degree learning

activities, and university strategic planning modeling.

Definition of Terms

- *Internal environmental scanning (IES) procedure*: A formalized data
collection, analysis, and reporting process to catalog existing internal organizational

units engaged in the programming of lifelong learning activities. Identification of each

unit's primary university mission, their lifelong learning activities, learning activity

participants and the resources expended in these efforts in order to support and inform

the strategic planning process.

- *Emergent internal environmental scanning (EIES) procedures:* This study's
methodology chapter assumes and defines seven primary IES procedures that outline

the process steps necessary to collect detailed organizational and environmental data

necessary to initiate a formal strategic planning process. It is expected that during the

course of conducting this study unanticipated problems may arise requiring ad hoc

procedures be developed. Similarly, as the individual processes are executed, new

methods of collecting and/or managing data may be conceived and preferred. These

newly identified processes are deemed emergent internal environmental scanning procedures.

- *Lifelong learning programming activities:* Lifelong learning programming as used throughout this paper reflects the paradigm described by Knapper and Cropley (2000) as the process of providing adults formal education opportunities through a set of defined organizational, administrative, and methodological procedures that seek to promote and deliver lifelong learning to adults outside of the traditional degree granting organization. Additionally, for the purposes of this study, lifelong learning programming implies mediated instruction, on-campus or online, for a fee with the specific purpose of generating revenue in exchange for a specific lifelong learning programming activity.

- *Open enrollment:* Enrollment on demand as a student in an institution of higher education irrespective of formal qualifications (Mirriam-Webster, 2007). Additionally, for the purposes of this study, open enrollment implies student and registration services will be provided by the lifelong learning unit and outside of the traditional degree program registrar and student advising organizations.

Limitations

Southwestern University does not have a specific source document defining the institution's interpretation of the term lifelong learning programming.

Southwestern University does not have an authoritative source document outlining the institution's lifelong learning mission or objectives. No unified vision of lifelong learning goals is described, nor are any measures of lifelong learning programming success addressed formally in a university document.

Much of the specific data collection effort related to university-sponsored non-credit online learning programming is reliant on the responses provided by interviewees through a structured telephone interview process. The quality of the collected data was dependent upon the cooperation and/or corporate knowledge of the incumbent program coordinator.

Delimitations

This research used four university data collection systems that capture all non-credit learning activities conducted on-campus and online of the university studied for a single Academic year 2007-08. These activities include faculty and staff training, extracurricular student activities, and non-university sponsored use of facilities, in addition to adult learning activities previously defined as lifelong learning programming. Only those activities defined as lifelong learning programming, university sponsored, open enrollment, and offered to the general community for a fee was documented as a university-sponsored lifelong learning system in this study.

The findings of this research are based on the case study of a single university and reflect the unique organizational structures and operational environment of that institution.

Assumptions

1. Because the state has not enacted legislation nor appropriated funds for subsidizing public lifelong learning systems, it is a reasonable and appropriate

expectation for the university's lifelong learning unit to be self-supporting and contribute to the unrestricted revenue stream.

2. A sustaining number of students and, in turn, revenues from course fees will flow to that institution or organization providing the most responsive, relevant, and learner-centric learning opportunities and processes. Maintaining a competitive edge within these factors requires an organizational commitment to strategic planning and a process of continuous program improvement.

3. Enhancing revenue generation at the studied university by increasing the number of non-degree seeking lifelong learning students will likely require improvements to existing programming coordination, learner access, and user-centric service, preferably through the application of a recognized strategic planning process and follow-on implementation of a structured lifelong learning model.

4. Implementation of the IES procedure will produce critical organizational and programming data necessary to accurately complete the strategic planning process.

CHAPTER 2

LITERATURE REVIEW

Lifelong Learning Defined

Terms for adult learning and the organized systems supporting those learners abound; lifelong learning, continuing education, adult education, and community education just to name a few. All of these terms have been used at one time or another to mean more or less the same thing (Courtney, 1989). This situation has, and continues to cause some frustration and debate among practitioners. The oft cited scholar within the field, Richard Peterson (1979, p. 13) was moved to comment, "The field of adult education has a vocabulary possible unparalleled in its confusion." Most of this confusion comes from the multiple meanings for single words or phrases dependent upon the particular context in which the terminology may be used. Unfortunately, few typologies within the field are entirely useful, they force diverse activities into fixed categories, they often oversimplify, and occasionally mislead (Peterson, 1979). The terms *lifelong learning* and *lifelong learners,* when contextually appropriate, are used exclusively throughout this paper in order to standardize the various terms used within the literature over the many years to describe the processes of formalized, adult, non-degree credit learning activities.

Learning is intrinsic to living. Within each individual, lifelong learning is a combination of processes stimulated through experiences within the physical environment and social interaction. The whole person, body and mind, transforms the perceived content of these experiences through cognition, emotions and practical application into a person's individual biography resulting in a more experienced,

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continually changing person (Lifelong Learning, 2005). As an organizational process,

lifelong learning programming is a conceptual framework for conceiving, planning

implementing, and coordinating activities designed to facilitate learning by all citizens

throughout their lifetimes (Peterson, 1979).

Characteristics of Contemporary Adult Lifelong Learners

Peterson (1979), almost thirty years ago, cataloged the factors behind the adult-

centered approach to lifelong learning motivation. More current research confirms

(Knapper & Cropley, 2000) that these same factors remain just as valid and relevant to

lifelong learning programming as we begin to close the first decade of the twenty-first

century.   These factors of adult learners' motivation are itemized in Table 1.

Table 1

Factors Describing Learning Motivations in Adults (Knapper & Cropley, 2000)

Desire to achieve practical goals – get a new job or advance in a current career.
Desire to achieve personal satisfaction and other inner-directed personal goals.
Desire to gain new knowledge, including the desire to learn for its own sake.
Desire to achieve formal educational goals such as degrees and certification.
Desire to socialize with others or to escape from everyday routine.
Desire to achieve societal goals.

In a manner similar to Peterson's itemization of adult learners' motivations and

goals, Cropley and Knapper (1983) identified and listed the prerequisite behavioral

characteristics of the idealized lifelong learner necessary to meet their personal learning

goals. These characteristics are provided in Table 2.

Table 2

Behavioral Characteristics of Adult Learners

Adult learners are strongly aware of the relationship between learning and real life.

Adult learners are aware of the need for lifelong learning.

Adult learners are motivated to carry on a process of lifelong learning.

Adult learners possess a self-concept favorable to lifelong learning.

Adult learners possess the skills necessary for lifelong learning.

Historically, lifelong learning programming has always existed alongside other

formal educational activities in order to specifically respond to the particular needs of

adult learners. Programmers must recognize that the characteristics of learners and

their educational needs change continually over time. This relationship between

education need and educational programming has a direct and symbiotic relationship

with the technological and cultural environment in which it occurs (Rachal, 1989). This

study investigates the changing face of lifelong learners and their needs in the

Information Age, an age of sometimes overwhelming change and potential information

overload. It also explores the institutional systems, designed and/or evolved to provide

these lifelong learners a formal educational environment, many of which are ill

structured to meet post-modern adult learner demands and organizational challenges.

Development of an individual's capabilities and disposition for lifelong learning is

widely agreed to be an essential life skill for one's professional success and emotional

well-being in the twenty-first century's advanced technological-global community environment. Learning and motivation for learning are natural processes that occur when the conditions and context of learning are supportive of individual needs, capacities, experiences, and interests (Peterson, 1979). For the individual lifelong learner within the post-modern environment, learning must be more than the learning that takes place through the natural processes of living and more than a willingness to engage in continuing professional development (Crick & Wilson, 2005). Livneh and Livneh, (1999) note that not only is an individual's participation in a program of continuing education a critical part of ongoing development, it is also apparent that participation in isolated, individual, unconnected offerings is no longer sufficient. Each individual's continuing education should be a cumulative, integrated process directed toward optimum performance rather than a series of unrelated events (Crick & Wilson, 2005). Demands created by this global-technological environment require lifelong learners to approach their learning in a manner that acknowledges an active awareness of the methods and processes of learning and personal engagement with other learners within a community (Crick & Wilson, 2005).

As the growing population of lifelong learners becomes more sophisticated in understanding lifelong learning delivery options and more demanding of learner-centric oriented provider systems, the old, reactive approach in dealing with changing learner needs will not be sufficient in the mass-market education delivery environment. Lifelong learning activity providers need to understand the motivations of adult learners. This will require existing lifelong learning providers to critically reevaluate their existing programming for adequacy in meeting current and future learner needs. For many

university-sponsored programs this assessment could likely result in a perceived need for organizational restructuring. Bryson (2004) and Stufflebeam (2002) among others have recognized this need and have offered models on strategic planning specifically tailored to the needs of higher education. Regardless of a particular strategic planning model's origin most all call for an initial scanning procedure, referred to as "environmental scanning" by Bryson and as "context evaluation" by Stufflebeam, to identify and catalog existing university lifelong learning support systems and programming inventory. Bryson (2004) further breaks down his construct of environmental scanning into "internal" and "external" components, the protocols of "internal environmental scanning" (IES) is of particular interest in this current study.

Because knowledge changes rapidly and unpredictably in the twenty-first century technological environment, competency gained from a current degree plan will be out of date in a relatively short time. Howell, et al. (2008) have reported that between 1970 and 1999 the occupational half-life (the number of years it takes for half of one's knowledge and skills to become obsolete or outdated) dropped from between12 and 15 years to between 30 and 36 months. Nearly every new graduate will need to sample the knowledge base from time to time to maintain competency. An advanced degree will do that; however, a less burdensome system, as provided by lifelong learning programming, to keep adult learners current in a range of subjects is considered a necessary alternative, and is widely available from a variety of non-degree credit lifelong learning sources, including university-based programs. Because the pace of technological and global change create immediate and necessary learning needs, lifelong learners may not willing to go through the expense in time and the complex

administrative procedures of being admitted to a standard degree program for each formal learning activity need they perceive necessary to maintain their professional status and quality of life.

Within the context of the Information Age, a traditional degree program as a method of continuously updating knowledge and skills through formal learning activity has several flaws (Rowley, Lujan, & Dolence, 1998). First, it should not be necessary for the learner to enter a degree program to access a knowledge base, especially when the knowledge sought is one-dimensional and does not require a systematic progression of skill development to utilize that knowledge base. Further, it should not be necessary for a learner to meet prerequisites for a whole program or course in order to get access to the one course, or part of a course, that contains the specific knowledge needed. In an environment where the learner seeks competency in a particular knowledge base and no degree is desired, the learner should be able to access the material until competency is reached (Rowley, Lujan, & Dolence, 1998). The open-access and focused content of lifelong learning programming well serves the learning needs of this pragmatic learner. However, not all university-based lifelong learning units, particularly degree-credit extension programs, are conceived and/or structured to meet the present generation of adult learners who have come to view formalized education delivery as a commodity.

This generation of learners seeks sources of education that help them understand a singular area of new knowledge thoroughly, while providing some basic analytical skills to complement that new knowledge (Rowley, Lujan, & Dolence, 1998). Most adult learners are looking for options other than the traditional university degree

process and there are now many alternatives for them to choose from; universities and colleges with sophisticated, adult-centered lifelong learning units, proprietary colleges, corporate universities, and commercial online learning providers. Likewise, business and industry understand the need for on-going formal learning and add to the demands for relevant programming (Jarvis, 1999). Motorola alone requires its 139,000 employees to take at least 40 hours of training a year; many attending its own corporate university. Additionally, Motorola's corporate university attracts over 75,000 non-staff students each year, directly competing with university-sponsored lifelong learning programs (Nasseh, 1999).

The learning objectives of the post-modern adult lifelong learner differ in several significant ways when compared to the traditional undergraduate or graduate degree seeker and even those of previous generations of lifelong learners. The greatest part of this differentiation can be attributed to the present state of mass individualization within the current cultures of the developed world (Glastra, Hake & Schedler, 2004). Increasingly, human activities are being abstracted from their traditional sites of family, community, and the workplace (Strain, 1998). The concept of individualization described by Strain refers to the growing autonomy of individuals as they attempt to engage and understand the world about them. Traditional social systems and moral orders no longer serve as the individual's primary guideposts. Rather, individuals are becoming members of an increasing number of diverse, loosely organized, and often transient groups and networks such as Internet discussion boards, single-issue movements, and chat rooms, Facebook and MySpace. These niche communities more closely reflect the individual's own personal attitudes, values, and

needs. Compared to more traditional social structures these groups are often more volatile, transient, and based on relatively loose forms of personal interaction (Usher, 2001).

This individual autonomy and personalization of values and needs creates new challenges for the lifelong learning programmer. Increasingly in post-industrialized nations, individuals see their primary quality of life needs being met and are able to place more emphasis on higher-level cognitive needs (Jongbloed, 2002). These higher level needs relating to personal recognition and self-actualization lead to a desire to distinguish one's self from others and, in turn, create greater heterogeneity in all populations, including lifelong learners (Jongbloed, 2002). Furthermore, advanced information technology systems will increasingly amplify people's intelligence through cognitive partnerships between users and intelligent tools. The use of these intelligent tools as cognitive enhancers will add a new dimension to human intelligence centered on higher-order mental attributes and will create new, unimagined, and as of yet unclearly defined learner needs (Dede, 1992).

Lifelong learning providers of the twenty-first century, particularly university-led programs, must be prepared to lead in the development of programming and delivery methodologies designed to address the challenges and, in turn, capitalize on these emerging cognitive partnerships. In many cases, this will require the university-sponsored lifelong learning program to complete a significant reorganization effort to identify and create the organizational structures and programming adjustments necessary to support cognitive partnership learning methodologies.

In the past, most university-sponsored lifelong learning units would likely have

approached each newly perceived learning need as a trend and react to the trend by merely adding a new course or course package to their inventory (Sork & Cafferella, 1989). The pace and character of change in postmodern learner characteristics, learner needs and grouping of learners through mass-individualization is too great to be addressed piecemeal. A strategic visionary approach is the most appropriate response. Prior to initiating any comprehensive strategic reorganization effort, the prudent practitioner will wish to complete the initial strategic modeling procedure of IES in order to document the unit's existing structures, programming and served populations to assist planners in all subsequent strategic planning process.

In order to effectively meet these challenges, lifelong learning organizations must be able to define the educational mission, business concept, and implementation strategies in their planning processes, which will allow them to respond rationally, and selectively to the unpredictable demands of countless heterogeneous clusters of learners in a changing technological and cultural environment (Jongbloed, 2002). This could mean targeting only a few groups of the countless heterogeneous interest groups who would be particularly well served by the unique learning resources retained by a university-based lifelong learning provider and of particular value to the group served. Traditionally, most university-sponsored lifelong learning programs have offered their formal learning activities "cafeteria style," offering a wide selection of courses, expecting most every group of learners to be attracted to at least a single subject of interest and, in turn, the mere numbers of these diverse groups will keep the programs solvent through course fees.

Post-modern lifelong learners seek education programming on their own terms,

not the institution's (Hiemstra, 2002). They want lifelong learning programming that will

recognize and accommodate their working-family lifestyles and that is relevant to

achieving their immediate educational objectives for application in their present

business or social environments. They want an enrollment process and learning

experience that provides ease of access, as well as client-oriented processes that

coincide with their perspectives of formalized educational activities as a global

commodity (Nasseh, 1999). This often means learning activities must be available off

routine institutional hours, off-site, online, and, in particular, convenient to their own

schedule (Rowley, Lujan, & Dolence, 1998).

This very large portion of the current adult lifelong learner population is an early

prototype of all future learners. They are the more mobile and less loyal to an academic

institution than was the case with previous generations of lifelong learners (Rowley,

Lujan, & Dolence, 1998). These individuals seek advanced learning activities set in a

formal atmosphere but without the hassle of traditional admission, enrollment, and

extraneous degree requirements. Through advanced online and communications

technologies, they will abandon their relationship with their current institution to get the

educational experience that they want based on cost, convenience, effectiveness and

value (Rowley, Lujan, & Dolence, 1998).

This prototype generation of adult learners will soon influence in how business

and professional worlds view institutional higher education, and their expectations of

convenient, on-demand learning activities should not be under emphasized. Once

dissatisfied with a university or college experience, their support for the academy in

general will likely decline. Instead, they will turn to commercial educational providers

who tend to employ the strategic planning and assessment necessary to keep them attuned to learner needs and expectations (Rowley, Lujan, & Dolence, 1998). Dissatisfaction with the responsiveness of university-sponsored lifelong learning programming could spread to students of all types, traditional, nontraditional and lifelong learners, as well as institutional funding sources and educational policymakers (Rowley, Lujan, & Dolence, 1998). Furthermore, the existing challenge of meeting post-modern adult learner needs will only increase with the eminent arrival of the next generation of lifelong learners.

The year 2000 marked the entry of the next decade's generation of lifelong learners, the "Net-Generation," into the university and college pipeline. This generation born into the era of the Internet and the "knowledge society," has entered the higher education institution with a different philosophy and ideology about education, communication, technology and about the institutions themselves (Nasseh, 1999). They see institutions of higher education primarily as a source of necessary knowledge resources, learning tools and problem solving skills for personal discovery, employment success and life skills. With digital technology learning systems, the Internet, and innovative learning techniques ubiquitous in their earliest classroom experiences, they see the learning process as innovative, creative, individually unique and digitally based. As a group, they generally have a positive attitude for the future and see education as a major part of their lives and work (Nasseh, 1999). They have also been indoctrinated with the concept that to achieve success in life they must be prepared to be committed, self-directed lifelong learners within a global knowledge-based society (Rowley, Lujan, & Dolence, 1998).

Since occupational half-life is expected to be between a mere 30 to 36 months, newly learned skills will need to be updated relatively soon and continually thereafter (Martel, 1988). The Net-Generation will create a mass-market for the business of lifelong learning. However, just as they now approach education and learning far differently than all preceding generations, they will have strikingly different needs for lifelong learning programming and expectations of learning program providers (Nasseh, 1999). Lifelong learning providers will need to take inventory of their existing programming through a deliberate process such as IES or context evaluation and assess how well their programming matches these new learners' perceived instructional needs and preferred content delivery methodology.

Carnevale (1991) has described the modern, consumer-like learner as an individual that demands high quality, customized products and services, timely response and personal convenience. Higher education institutions and their lifelong learning units in particular, must come to understand this generation of learners, as they will become the adult learners of the foreseeable future. This generation will create a mass market for the business of learning which will view educational activities as a market-driven commodity. Adult learning as a mass market obligates institutions of higher education to understand the characteristics of this new generation of lifelong learners and to make programming and organizational adjustments for the future if they wish to compete (Boone, Safrit, & Jones, 2002). These learners see traditional institutions of higher education as only one of many providers of market-driven education.

University lifelong learning providers should take stock of their existing

programming and the learner groups they serve. Lifelong learning program providers should develop a sense of organizational situational awareness through an initial strategic planning procedure such as Bryson's (2004) IES or Stufflebeam's (2003) context evaluation. At a minimum, the individual learning activities currently being provided should be cataloged. This identification process provides an informational foundation for all follow-on strategic planning processes undertaken by concerned program stakeholders and institutional planning teams. The strategic planning process can, in turn, be employed to identify specific learner populations who will be best served through the unique inventory of resources comprising their particular program. The lifelong learning provider is thusly able to redefine program mission and vision as necessary, and then implement an organizational and lifelong learning programming model utilizing their unique learning resources and delivery methodologies to advantageously serve the most appropriate learner population(s).

Forces Driving Lifelong Learning Programming Change

Nationwide, the fastest growing groups of learners participating in formal learning programs are adults seeking other than degree-credit education programs (Rowley, Lujan, & Dolence, 1998). In an era of profound social, economic, and technological change, education is generally considered a primary method for making efficient professional and personal adjustment to the change (Pyle, 1961). For the post-modern learner, university-sponsored lifelong learning programming provides a recognized, respected source of authoritative knowledge.

The National Center for Education Statistics (NCES) reports that adults

participating in formal, not-for-degree credit courses rose to 46% in 2001 for the U.S. population overall, up from 40% in 1995 (NCES, 2004). Most of this increase can be directly attributed to work-related and professional development courses which rose by 9% during the same period; however, steady growth in programs providing formal learning activities in personal technology and intellectual enrichment produced significant growth in the range of 5% as well (NCES, 2007). Another demographic study conducted by NCES's Lifelong Learning Task Force predicts that adult participation in on-going, non-credit education will become even more prevalent in the near future due to the growing fluidity of the individual socioeconomic life course (NCES, 2000). The average high school graduate of 1990 can expect five to eight careers over a lifetime (Martel, 1988). This means that the activities of living and working will require a life of continuous adaptability and refocusing, "from a lifetime career to a lifetime of careers" (Martel, 1988, p. 6).

The perceived need to continually develop and maintain individual professional knowledge in the face of almost overwhelming change is the most notable driver of renewed interest in university-sponsored lifelong leaning programming (NCES, 2000). Because knowledge bases of all types are rapidly changing in response to technological, economic and cultural change, competency gained from a currently undertaken degree plan will be out of date in a relatively short time (Jarvis, 1999). However, there are other significant, though less mentioned, external factors driving demand for lifelong learning programming; direct employer encouragement and support for learning activities (NCES, 1999), state and federal financial incentives for participating in formal classroom coursework (110th Congress, 2007), and personal

enrichment and emotional well being (NCES, 2002).

Employers not only recognize the need for an educated workforce with current skills, they are for the most part willing to support individual lifelong learning through both financial and organizational support. Nationally, about 75% of companies with 20 or more employee-students offer some sort of tuition reimbursement (NCES, 1999). Many of these companies offer comprehensive packages of cash awards for tuitions and fees, release time for studies, and/or employer-sponsored courses at the worksite.

The federal government in recent years has come to recognize the national economic importance of a lifetime of participation in formal learning events. Legislation has been enacted to ease the financial burdens of attending formal lifelong learning activities and improve access to these activities for a much broader range of learner populations. The Lifelong Learning Act of 1992 (102nd Congress, 1992) expanded access to federally guaranteed student loans for non-degree seeking lifelong learners primarily for the purpose of post-secondary professional skill and career training. In 2007, the (110th Congress, 2007) eased access and, in turn, increased the potential demand for formalized educational activity by creating provisions for a tax-based lifelong learning incentive through the Lifelong Learning Accounts Act of 2007. This portable, worker-owned savings account, similar in concept to the Individual Retirement Account (IRA), can be used for personal and professional education, skill training, and/or apprenticeships.

The relentless course of continuous technological and cultural change has created demand lifelong learning program development across all programming elements; not only practical professional development and business application, but for

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the intellectual and emotional reasons as well (Lamb & Brady, 2006).

For the most part, contemporary university-sponsored lifelong learning units, as described within this paper, emerged during the 1960's and 1970's in what was commonly known as the "Free University" or a "Skills Exchange" (Knapper & Cropley, 2000). These late twentieth century informal course programs primarily provided a limited, on-campus personal enrichment package within a structured learning environment to the citizenry of the collocated community, free or at a nominal charge.

The personal enrichment, liberal arts programming, which at one time provided the core of most Free University modeled programs of the 1970's, has given way to course packages more economically practical for both the learner and learning provider; career preparation, professional development, and technology applications. Because only those programs for which people are willing to pay for are developed and maintained, current programming has warped to the purely pragmatic (Flanagan, Franceska, & Smith, 1982).

Just as technology and cultural-economic systems remain in a constant state of flux, so now are the foundational intellectual and social constructs that have guided individuals for centuries becoming inadequate (Bagnall, 2001). Liberal educational programming should be considered a critical course component of any restructured lifelong unit.

Knowledge and truth is now something provisional, constantly changing, and problematic (Aspin & Chapman, 2001). Postmodern lifelong learners are constantly faced with increasingly challenging ethical questions regarding the environment, advances in life sciences, molecular biology, and nanotechnology (Anton, Silberglitt, &

Schneider, 2001). These emerging questions will increasingly, demand individual

reevaluation of the personal philosophy of what it means to be human, as well as how

one chooses to interact within the evolving physical realities of their life course, under

the direct influence of a socio-cultural contradiction of "mass individualization" within a

broadened, global culture.

Adult learners who approach formal learning activities from the perspective of

"learning for the sake of learning" or "to gain a better knowledge of the world" are still

well represented, in many variations, among the heterogeneous groups of postmodern,

mass-individualized learners (Lamb & Brady, 2006). The National Center for

Educational Statistics has reported that 73% of adult learners surveyed claim that

personal enrichment or interest in the subject were important considerations in returning

to a formal educational setting (NCES, 2002).

The techno-scientific advances set within a global culture and economy,

inconceivable to most individuals at the close of the twentieth century's industrial age,

will likely revitalize the need for formal, open enrollment access to a humanistic

knowledge base. Access to the university's knowledge bases through a structured, yet

adult learner-centered environment will provide opportunities for individuals to establish

and maintain a rationalized sense of place and self in a world that will need to be

continuously reconstructed conceptually by that individual. Universities will need to

catalog and evaluate their inventory of existing personal enrichment programs, that

have, in many cases, fallen into neglect or been eliminated altogether, to ensure that

they provide a relevant mix of topics addressing the intellectual challenges brought on

by this age of rapid technological, bio-molecular, and global cultural change. Twenty-

first century lifelong learning providers need to be prepared to make deliberate, strategic programming adjustments and additions to serve this reemerging adult learner population.

Evolution of University-Sponsored Lifelong Learning Programming
Within the United States

The point at which lifelong learning is assumed to have become a field of professional practice is subject to argument. Sharan Merriam and Phyllis Cunningham (1989) trace its roots to 1926 with the formation of the Adult Education Association. Others push its formation further back to 1915 with founding of the University Continuing Education Association. Regardless of when lifelong learning in the United States became a field of practice, individuals and institutions have continuously provided non-degree credit learning activities for adults since colonial times.

Lucas (1994) identifies three clearly distinct adult, non-degree learning program areas in eighteenth century America; New England evening schools, apprenticeship training, and informational public lectures by leading intellectuals of the day. An early, more sophisticated form of non-credit lifelong learning emerged in the dawning years of the nineteenth century with the formation of extracurricular literary societies by college students outside their coursework (Rudolph, 1990). In 1826, Josiah Holbrook is given credit for founding the Lyceum movement (Courtney, 1989). Both of these adult learning activities share a similar philosophy of intellectual vitality and literary exercise, as do the liberal arts-centered Lifelong Learning Institutes (LLI) now active on many university campuses across the nation.

At the turn of the previous century, Progressivism and its service ideal were

manifested in a new university-sponsored lifelong learning program exemplified by the University of Wisconsin. Charles McCarthy's (1912) *The Wisconsin Idea*, took the University of Wisconsin's agriculture extension program one step further by offering short courses and lectures on a multitude of topics within various disciplines, presented by leading members of the faculty at large population centers across the state and distant from the university campus (Rudolph, 1990). *The Wisconsin Idea* at its core was a Progressive concept in support of informed democratic participation and social action, and was presented as a legislative proposal for state financial support of adult learning throughout the state. The concept of "the boundaries of the university are the boundaries of the state" (McCarthy, 1912) was introduced, and this philosophy is still essentially embraced by the citizens of that state and its university system. This early North American lifelong learning model would soon be widely cloned and maintained by colleges and universities through the late twentieth century (Long, H., 1983).

The federal government soon followed on the legislative path toward public-sponsored lifelong learning through the passage of the Smith-Lever Act of 1914, a cooperative extension partnership between the U. S. Department of Agriculture and the state land-grant universities authorized by the Morrill Acts of 1862 and 1890. Primarily, this legislation was enacted to promote vocational agriculture and provided federal funds for this purpose (Smith-Lever Act, 1914). The guidelines in the original legislation allowed for 14-year old students attending secondary school, older persons not attending secondary school, and even persons already in the work force to receive training (Smith, 1999). The Smith-Lever Act evolved over the many decades of its life

and developed into a dedicated vocational program and less an adult lifelong learning program.

The year 1936 saw the establishment of the first deliberately planned university-sponsored lifelong learning organization with a defined mission of serving adult learner needs and specially equipped quarters within the University of Minnesota (Pyle, 1961). However, the events of WWII would put non-critical lifelong learning programming on hold until the Allied victory and the federal government's next foray into adult learning and education, Servicemen's Readjustment Act of 1944. This legislation, though not a formal lifelong learning program, did allow for financial support for a wide array of adult learning opportunities, ranging from personal flying lessons to a four-year college degree (Servicemen's Readjustment Act, 1944).

The decade of 1970 proved to be a monumental era for non-degree credit adult education, not only within the United States but across the globe (Aspin & Chapman, 2001). This decade saw the emergence and spread of scholarly writing on the topic of "lifelong learning" and the development of a wide selection of adult learning programming opportunities. It was also during this period that divergence between North American, European, and under-developed nations' concepts and driving philosophies on adult-centered lifelong learning became evident. European programming was shaped by findings of the education committees of the Organization of Economic Cooperation and Development (OECD) and the United Nations Educational, Scientific and Cultural Organization (UNESCO). European lifelong learning took on a more centrally controlled, government-sponsored workforce development feature (Elliot, 1999). Under-developed nations whose lifelong learning

initiatives are primarily sponsored through UNESCO are focused on adult literacy and emancipatorial education in the vein of Paulo Freire (Bagnal, 2001).

The general population's interest in central government's participation in lifelong learning also took hold within the United States with the passing of the Lifelong Learning Act of 1976 (Lifelong Learning, 1976). Commonly referred to as the Mondale Act, this legislation, while it did help spark a renewed interest in lifelong learning within the country, it did not have an apparatus to maintain the program long term. Initially, this pilot program was established to conduct a study of how existing federal programs could help produce a coordinated lifelong learning effort and to provide funds for a few grants to test lifelong learning delivery systems. However, its budget was immediately cut from $40M to $20M its first year, and the entire program was dropped in 1978 (Peterson, 1979).

The more lasting legacy of the 1970's lifelong learning movement within the United States was the establishment of the Free University, the Open University, and the Skills Exchange learning organizations (Knapper & Cropley, 2000). These grassroots personal educational enrichment programs were primarily attended by individuals interested in learning for learning's sake and were designed to be informal, almost social learning events. Courses were scheduled based on the desires of participating students. Instruction was typically provided by volunteer faculty and often by private citizens without any particular academic qualification beyond enthusiasm and basic knowledge of the particular topic. For the most part, university involvement with these programs was limited to providing classrooms on a space available basis and

possibly a staff member to coordinate classroom assignments and publish course brochures (Knapper & Cropley, 2000).

For a large number of universities around the country, this model became the founding structure for their existing lifelong learning program and, for many university-based programs, the last recognized model deliberately applied to their lifelong learning programming. This study's investigation specifically targets these existing programs and proposes a course of action toward developing a preliminary, strategically oriented survey procedure, IES, which is intended to support the university-sponsored lifelong learning unit in ultimately identifying and applying a more sophisticated, appropriate lifelong learning model for twenty-first century non-degree credit programming.

Philosophical Foundations of Lifelong Learning within the United States

University-sponsored lifelong learning programming within the United States has existed for decades; however, a widely agreed upon integrating philosophy for general practice within North America has been lacking (Peterson, 1979). Nationwide, university- sponsored lifelong learning has focused on the small things, in incremental steps, without a clear vision of the big picture or knowing where it wants to go in the future (Long, H., 1983). Since the early 1970's, European countries have led and continue to lead in the discourse of adult lifelong learning, particularly on issues of philosophy, theory and modeling.

The field of practice in lifelong learning within the United States arose during the height of the Progressive movement (Elias, 1982). If there is any one particular philosophical concept that threads its way throughout the field, it would appear to be the

pragmatic application of learning. The practical application of lifelong education and

learning continues to be one of John Dewey's most tenacious legacies to the field of

lifelong learning programming, both at the individual and institutional level. At the

participant level, emphasis is on learning for a specific purpose. At the institutional

level, programs are expected to be self-supporting, generating pragmatic decisions

made on the basis of maintaining a mix of programs designed to attract the most

potential participation (Long, H., 1983).

Within the United States, the wide diversity of activities and purposes of lifelong

learning programming is both a strength and weakness. While this diversity does allow

for creativity and responsiveness through an entrepreneurial approach to education

delivery, it does so at the cost of field fragmentation and little sense of common identity

(Merriam, 1982).

For the most part, practitioners in the field do not tend to identify themselves as

researchers or even adult educators. Merriam & Brockett (1997) attribute this lack of

identity as an educator to the marginality in which most university-sponsored lifelong

learning programs operate. Lifelong learning as a field of practice in the United States

does not have a credentialing mechanism that restricts who can practice and, therefore,

is most often undertaken more as a field within administration rather than that of higher

education (Merriam & Brockett, 1997). In turn, by not identifying themselves as

educators, practitioners are usually unfamiliar with the body of knowledge that exists

and are not likely to contribute to it. Philosophy informs practice. Identifying and

adhering to a particular lifelong learning philosophy helps to explain a program's ends

and objectives of practice. Identified program objectives and goals, in turn, help to

define the program, its targeted adult learners, and its unique selling proposition within the educational mass-market.

Hal Beder (1992) has described four social functions underlying the purposes of adult lifelong learning: to facilitate change in a dynamic society; support and maintain good social order; promote productivity; and enhance personal growth. Beder goes on to tie these functions to the following three foundational programming philosophies that are presently evident in lifelong learning programming worldwide.

- *The Liberal-Progressive:* Focusing on the cultivation of intellect, including knowledge of facts, systematic grasp of subject matter, and the ability to critically assess and analyze this system of thought, is rooted in the traditional "instructor as the master" who transfers knowledge to the learners. While this approach to lifelong learning predominates in workforce training both in the United States and in Europe, it is not necessarily the best approach for serving postmodern problem solvers in the global Information Age. However, it does continue to be applied in liberal learning settings, most notably through the programmers carrying on Hutchins and Adler's "The Great Books Foundation" seminars and lecture series.

- *Countercritique:* This adult educational philosophy could equally be considered a social philosophy, empowerment of the socially oppressed through education, that is essentially unseen in North American lifelong learning programming. Rooted in Marxist theory, the application of this philosophy is exemplified by the works of Paulo Friere. While there are practitioners worldwide adhering to this particular philosophy, for obvious reasons it has had relatively insignificant influence in the United States.

- *Personal Growth:* A more contemporary and widely adhered philosophy guiding

practice in North American lifelong learning comes from the Personal Growth

movement. Personal Growth's paradigm defines the objective of lifelong learning

programming as assisting learners in making choices that maximize their human

potential. Lifelong learning programs are learner-centered, and the instructor is more

properly characterized as the facilitator of learning rather than a source of knowledge.

In practice, within the United States, individual lifelong learning programs tend to

be more affected by the particular social function they serve than by any consciously

selected thought system. As a result, the underlying philosophies driving any particular

lifelong learning program have been most likely developed from a specific purpose

rather than a previously existing guide to practice (Sork, & Cafferella, 1989). However,

as established university-sponsored lifelong learning units begin the process of

reengineering their program visions, objectives and goals, they will need to consider

incorporating a defining foundational lifelong learning philosophy to guide the

development of their strategic plan. Patrick Boyle (1981) has offered a uniquely

American philosophical framework for lifelong learning programmers that recognizes

and provides adjustments for the individual and institutional pragmatism inherent in

North American lifelong learning programming. This framework is provided in Table 3.

The beliefs, values, and attitudes of the lifelong learning programmer and

university leadership have a profound effect on programming vision and operational

decision-making (Boyle, 1981). Discovering and developing personal and institutional

philosophies is a critical prerequisite to development of a strategic vision and plan.

Defining the purposes of lifelong learning, the nature of lifelong learners, the processes

of learning and gaining knowledge, and the goal of program development guides the

institution in preparing for expected change and the eventual reengineering of the

organization into a learner-centered knowledge-building resource.

Table 3

Boyle's Framework for a Working Lifelong Learning Philosophy

Beliefs about the purposes of lifelong learning	• Help adults cope with the objective conditions of their world • Equip adults with problem-solving skills • Help adults change their professional, economic and/or social conditions • Help adults acquire the information and knowledge necessary to live complete lives
Beliefs about learning and the learner	• A reactive creature who changes primarily as a result of formal instruction • A unique being capable of achieving one's own potential through shared interaction with other beings in a learner-centered environment
Beliefs about teaching and the programmer	• The educator at the center of the educational process • The learner accepts responsibility for developing knowledge
Beliefs about the process of program development	• Involvement by clientele • Needs and interests of clientele • Balanced access to programming • Program evaluation • Decision making • Program support • Focus on programming category(ies) • Accounting for individual differences • Accreditation of programming • Defining quality

Context of University-Sponsored Lifelong Learning

Lifelong learning programs as they exist today are designed to serve the educational needs of one or more demographic groups from at least half a dozen discrete lifelong learner populations. Because of the great variety of institutional and stakeholder interests, lifelong learning is neither unified nor monolithic (Hunt, 2008); in fact, Boone, Safrit, & Jones (2002) have identified no less than 14 lifelong learning program models. These models vary from each other in their attempt to address unique programming factors based on a particular sponsoring unit's mission, target population, and/or learning delivery systems. While these models do provide some specialized guidance for specified categories of lifelong learning providers, they do not address unique factors in implementing their model within the boundaries and organizational limitations of a long-standing existing lifelong learning program.

Program packages tend to emerge reactively by organizations attempting to address the specific perceived learning needs of their served clientele (Merriam & Brockett, 1997). Organizations maintaining specific lifelong learning structures to provide services to these learners range from church groups and city community centers, private non-profit organizations and proprietary schools, business and industry schools and, of course, the formal education hierarchy: secondary schools; community colleges; and four-year colleges and universities.

Theodore Kowalski (1988) provides a useful typology of lifelong learning providers, ordered according to the provider's primary purpose, function, and climate. An example of that typology is provided at Table 4.

Table 4

Kowalski's Typology of Lifelong Learning Providers

Type A	Institutions that provide lifelong learning as an exclusive function.	Osher Institutes, lifelong learning institutes
Type B	Institutions which are schools and other educational institutions that offer lifelong learning as a secondary function.	Public schools, colleges, universities
Type C	Institutions which are community service agencies that provide lifelong learning as a secondary function.	Parks and recreation departments, libraries, museums, media
Type D	Institutions which are private organizations that offer lifelong learning as a secondary function.	Business and industry, corporate universities
Type E	Institutions which are voluntary organizations and groups that provide lifelong learning as a secondary function.	Professional organizations, churches, YMCA
Type F	Institutions which are government agencies that offer lifelong learning as a secondary function.	Military, prisons

With the exception of Type A institutions, all other formal lifelong learning programming is produced by institutions whose primary mission is something other than lifelong learning. Knowles (1977) has noted adult learning programs developed through these non-dedicated lifelong learning providers tend to be developed without an awareness of being a part of the larger field of adult education and, as such, tend to identify with the host institution, particularly in content, structures, processes, and

clientele. This role confusion is evident in many university-sponsored lifelong learning programming units today.

While all universities within the United States are uniquely organized to serve the needs of their constituent learners and community, their undergraduate and graduate programs all follow the same general college/school-departmental model, delivering educational content through college departments and providing similar, recognizable, course offerings through similar, recognizable organizations. Not so, with their continuing education programs, which widely vary in organization, number of courses, and variety of programs, program nomenclature, and program quality. These nontraditional organizational structures, missions and instructional delivery methods contribute to the lifelong learning unit's marginality on campus. This marginality results in a distinct lack of influence on the institutional strategic planning processes necessary to address the needs of twenty-first century learners who will be seek learning options outside the traditional undergraduate and graduate degree pipeline.

Unfortunately, as we approach the end of the twenty-first century's first decade, many university-sponsored lifelong learning programs remain misunderstood within the campus community, arbitrarily structured, unnecessarily complex and less than optimally responsive to the changing populations of lifelong learners and their non-degree seeking educational needs. A new and realized lifelong learning mission requires creating a new organizational structure. The university must make a firm policy decision that providing learning for life opportunities will be a central institutional objective rather than a marginal effort (Pyle, 1961). Within most university environments, this means the lifelong learning programming unit should be prepared to

take the lead in this vision-changing effort. A reasonable first step in this undertaking would be an accurate accounting of the university's existing lifelong learning systems through a deliberate process of IES in order to inform and contribute to the follow-on university strategic planning processes.

Lifelong Learning within the University's Mission

The traditional higher educational institutions of colleges and universities serve only a minority of adult learning needs and are too limited and inefficient to supply the burgeoning needs of postmodern, Information Age learners (Martel, 1988). The demand for knowledge by twentieth-century adult learners does not necessarily conform to the narrow confines of existing university degree plans. "The need of learners to get specific knowledge on-demand is at direct odds with how most colleges and universities structure their certification and knowledge dissemination processes" (Rowley, Lujan, & Dolence, 1998, p. 134). Many campuses require full admission processing of individuals for them to take advantage of degree-credit courses through the university's non-credit extension programming. This is not a learner-centric approach and is particularly counterproductive when dealing with the postmodern lifelong learner (Flint, Zakos, & Frey, 2002). These obstacles and conditions lead adult learners to look elsewhere for educational programming (Long, N., 1990) (Rowley, Lujan, & Dolence, 1998).

In general, university-sponsored lifelong learning units can provide an attractive, adult-centered institutional alternative to learners frustrated with the cumbersome admission and registration barriers, or for those adult learners without the time and/or

resources necessary to pursue the full degree process when needing only access-specific pieces of the knowledge base.

Because the lifelong learning mission has and continues to be marginalized within the university's broader mission and supporting organizations, its dedicated lifelong learning units have little institutional influence on improving access to the knowledge bases other than through their own offices (Flanagan & Smith, 1982). Each generation of lifelong learning practitioners has made the plea for increased emphasis on and support of non-credit adult programming. Obviously, their requests have been received with little attention and limited results as each generation's request for change essentially echoes the previous generation's similar statements of need.

Over 60 years ago, the President's Commission on Higher Education felt obliged to write, "The present status of university extension services makes it painfully clear that the colleges and universities do not recognize adult education as their potentially greatest service to the democratic society. It is pushed aside as something quite extraneous to the real business of the university" (Higher Education for American Democracy, Vol. 1, 1948, p. 94).

A generation later, Malcolm Knowles repeated essentially the same lament, "The effectiveness and quality of many continuing education programs are questionable. One would expect that if colleges and universities are assuming leadership, significant research and modeling would have been done. Most lifelong learning programs are handicapped by day-to-day operations, administrative requirements, and the requirement to remain self-supporting; they have not taken the time or resources to

answer basic questions relating to their work" (Knowles, M., as cited in Pyle, 1961 p. 28).

Now, at the close of the 21st century's first decade, contemporary scholars of lifelong learning appear to repeat the familiar refrain, "Higher education in the late 20th century changed from an elite to a mass system of education in developed societies. Participation in higher education results in great demand for lifelong learning. Perhaps one of the most interesting aspects of this period of dramatic change is that it appeared to have occurred with little or no strategic planning, let alone a vision" (Schuetze & Slowey, 2002, p. 309).

Each university's commitment to lifelong learning is unique and reflects the nature of the community in which it operates, as well as the purposes and values of the institution. Flanagan and Smith (1982, p. 39) have described lifelong learning programmers as "entrepreneurs in a growing, but nevertheless consistently marginal, enterprise." This reflects the fact that most university-sponsored lifelong learning units are dependent on an organization whose main purpose is not the continuing education of adults. Most colleges have traditionally seen lifelong learning as a supplementary service, often as a means to improve the public relations of the institution (Ohliger, 1969).

Seldom existing as an integral component of the university's mission, lifelong learning units have attempted to satisfy the diverse groups of stakeholders "through small things, in incremental steps, without a clear vision of the big picture or knowing where we want to go" (Morse, 2008, p. 12). The priorities of the academy are not aligned with those of the paying public, and profound educational change must occur in

the face of both shrinking resources and public support (Rowley, Lujan, & Dolence, 1998).

To make a difference in the lives of lifelong learners by providing easy access to the ever-changing base of knowledge, lifelong learning programming must be a visible landmark on campus and an integral part of the university mission. "The colleges and universities should elevate adult education to a position of equal importance with any other of their functions" (Higher Education for American Democracy, Vol. 1, 1948, p. 94). Perhaps the magnitude of expected technological and cultural change, with its attendant need of mass-marketed lifelong learning programming, could bring about a more integrated approach to lifelong learning within the greater university's vision, mission, and goals. However, before a broadened strategic vision of the university mission could be implemented, lifelong learning programmers must be prepared to supply visionary planners with essential data regarding the current state of affairs within the university's lifelong learning system(s) and specific details of existing programming through a process of IES or context evaluation.

Lifelong Learning Program Categories

In most university-sponsored lifelong learning programs within the United States, the current lifelong learning programs have evolved from grassroots personal educational enrichment programs of the 1960's and 70's commonly known as the "Free University" or "Skills Exchange" (Knapper & Cropley, 2000). For the most part, these early university-sponsored lifelong learning programs offered programming through a single program category, *personal enrichment*. This category of programming was

offered to support one's realization of their full human potential and generally were associated with avocational, recreational and travel interests (Peterson, 1979).

Over time, these programs expanded beyond their original scope, particularly with the spread of PC-based information systems, to offices and homes, creating the need for hardware and software training that was quick, practical, and readily available. Huey Long (1983) referred to this category of programming as *occupational improvement.* Likewise, the spread of sophisticated information technologies created countless new careers which required learning beyond the secondary school, but with far fewer demands than those required for an associate's or bachelor's degree, described by Rachal (1989) as *occupational*. Concurrently, many university-sponsored lifelong learning programs added the sponsorship and coordination of programming for what Boyle (1981) refers to as professional *certification/recertification*. This programming was usually delivered through a conference or workshop format. Increasingly, university-sponsored lifelong learning has expanded to include *career development,* work-related instruction focused on skill attainment and job preparation, and *professional development*, advanced skill development and management training (Merriam & Brockett, 1997).

Over the years, existing university lifelong learning programming units provided an appropriate mechanism to deliver efficient, economical, and accessible professional education, career certification packages and personal enrichment learning activities to a broadened non-credit learner population, including those with specific learning objectives (Sparks, 1985). However, this evolution into a much more complex system of program categories was, in most part, carried out reactively with no visionary plan nor

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deliberately based on more sophisticated program modeling.

Complicating the deliberate planning and reorganization processes is the imprecise terminology used within the field of lifelong learning. Currently, lifelong learning programming provided by higher education institutions in the United States is individually described by the institution and structured upon the unit organization's unique developmental environment. Therefore, each institution's lifelong learning programming unit has defined, developed, and named programs and program categories uniquely. Unlike institutional degree awarding organizations and programs, which generally are universally recognized and understood, their continuing education program's naming and program descriptions may not, and most do not, correspond to similar programs at other, comparable institutions.

Boone, Safrit, and Jones (2002) speak of programming in very broad terms: degree-seeking, personal enrichment and career/professional development. However, as seen above, most every author on the subject of lifelong learning programming has contributed to the vocabulary of lifelong learning category typology, and each with his or her unique idea as to how course inventory fits into a particular typology scheme. Huey Long's (1983) organization of terms includes 36 programming categories, while Merriam & Brockett (1997) list five and Peterson (1979) four. In practice, lifelong learning program packages exhibit a wide variety of program nomenclature developed through individual practitioner interpretations of how an individual course of instruction should be categorized and labeled.

Downing (2007), through a survey of fourteen institutionally assigned peer universities, found no less than 13 discrete categorical terms used to identify groupings

of instructional packages into institutionally defined categories. This same survey found that across those peer universities, 45 sub-categorical terms were used to describe individual lifelong learning packages within the 13 categorical terms. Program categories and course package nomenclature is not consistent across programming units (Long, H. 1983). Downing (2007) found that individual lifelong learning units appear to arrange their program inventory elements uniquely and within an institutionally perceived relationship of a given course of instruction to any or all of four typological factors: instructional delivery methodology; course topic; learner demographic; and provider and/or learner expected learning ends. Long (1983) described program categorization within three organizing factors: function; topic; and institutional framework.

In practice, lifelong learning packages and individual courses of instruction are distributed across a wide array of topical areas that have been arranged in a manner that is historically and philosophically congruent with the provider's supporting institution's mission and lifelong learning program objectives (Merriam & Brockett, 1997). While there have been calls from practitioners within the field to agree upon a common set of typological rules and possibly the development of a major database to count, categorize and characterize lifelong learning program activities (Koloski, 1989), such an effort appears unlikely in the near future.

Considering the pace of change since Koloski's field-wide, central cataloging proposal 20 years ago, as well as the wide diversity in university-sponsored lifelong learning unit organization, mission and inventory, a more immediate and practical approach to dealing with the often confusing systems of lifelong learning programming

typologies would be an individual university assessment of its lifelong learning

programming systems, organizational providers, course inventories and learning

populations served. Application of an IES process would, at a minimum, provide

stakeholders an institutional common vocabulary and a lifelong learning data set for the

development of a strategic plan, and ultimately, the application of an organizational

lifelong programming model. Ideally, as more and more university-sponsored lifelong

learning programmers participate in their own IES procedure to achieve situational

awareness, a greater appreciation of the need for a more disciplined use of the field's

vocabulary will emerge and renew discussion within the literature.

University-Sponsored Lifelong Learning Program Restructuring

A new and realized mission requires creating a new organizational structure

(Morse, 2008). Because of the marginal nature of lifelong learning programming on the

university campus and the administrative orientation of its practitioners, few lifelong

learning planners conduct formal needs assessments and fewer still evaluate the

programs in a systematic manner (Pennington & Green, 1976). By administrative

default, many universities have encouraged proliferation of lifelong learning activities

throughout their entire organizational structure (Stern, 1967). Fincher (1972), Dede

(1992), and Rowley, Lujan, & Dolence (1998), among others, have noted the

unresponsiveness and inefficiencies of existing university-sponsored lifelong learning

programming and have recommended the implementation of the strategic planning

processes to reengineer programs to better serve changing learner populations and

needs.

Dede (1992), in addition to calling for organizational change, also provides a reasonable rationale for initiating a strategic planning process tailored to the university-sponsored program and a model of lifelong learning-centric planning considerations in the development of the ultimate strategic plan. This model is provided as Table 5. In Dede's construct, processes are first initiated with the identification of the ultimate goals of the program. As most models, it does not to take into account the organizational, structural and personnel issues inherent in a long-existing lifelong learning program nor how these existing factors can impede or enhance the strategic planning process. A blend of Dede's model for higher education-specific strategic change considerations and Bryson's (2004) and/or Stufflebeam's (2002) initial planning situational awareness procedures may offer a useable set of protocols to achieve the institution's ultimate lifelong learning goals.

Dede's model provides but one rationale for educational organization restructuring. In fact, Merriam & Brockett (1997) counted 93 publications in that same year and noted all these educational programming recommendations were essential based upon Tyler's (1949) *Basic Principles of Curriculum and Instruction.* Understandably, practitioners will rarely find a single model as a good fit with what actually occurs in their day-to-day operations and particular organizational relationships. "Most models fail to take into account the personality conflicts, political factors, and budgetary constraints that alter conceived plans of action. Neither do they take into account unique existing operational structures present in long-established programs" (Brookfield, 1986, p. 202). However, they are useful tools in providing direction and structure to the planner, provider, and staff.

Table 5

Dede's Model for Higher Education Strategic Change

Goals	Basing accountability on outcomes important to the society rather than on those metrics of educational accomplishment most easily measured.
	Setting challenging goals for student learning and staff accomplishment.
	Helping every student t grow in meaningful ways, recognizing that all learners must succeed if our society is to prosper.
	Focusing on mastery of higher-order knowledge rather than emphasizing performance fluency in basic skills.
	Making affective and motivational outcomes such as self-worth, curiosity, ethical understandings-as important as cognitive accomplishments.
	Attracting and retaining outstanding staff through a combination of salaries, working conditions, collegiality, respect from society, and the innate worth of the enterprise.
Pedagogical Strategies	Viewing students as active constructors of meaning rather than passive assimilators of data.
	Seeing instructors as facilitators of learning, who are themselves still growing in their knowledge, rather than as imparters of truths.
	Creating environments for learning that promote diversity, mixing different ages, developmental levels, and cultural backgrounds.
	Utilizing a repertoire of pedagogical techniques, including cooperative and self-directed learning approaches.
	Integrating curricular content around real-world issues rather than isolating subjects based on discipline-centered content.
	Tailoring instruction to each student's learning style and individual needs.
	Situating learning in an environment similar to that in which the knowledge will be used.

(table continues)

Table 5 (*continued*).

Organizational Strategies	Tailoring the organization of the educational setting to the needs of students and teachers, rather than subjugating teaching and learning to those practices easiest to manage, such as standard time slots for all class periods.
	Attempting innovative high-risk, high-gain strategies to enhance educational effectiveness rather than using a traditional teaching and learning approach with extra finances or effort.
	Intensively supporting human resource development to meet continuously changing role expectations.
	Utilizing a systemic approach that simultaneously reconceptualizes the curriculum, pedagogical methods, theories of learning, definitions of "quality" and "equity," organizational approaches, and the involvement of all society's interested parties.
	Aligning authority and responsibility, while decentralizing decision making to the operational level; classroom-based,site-based, and community-based management.
Assessment and Evaluation	Evaluating teams that share responsibilities and rewards rather than individuals held accountable for doing a particular job.
	Assessing effectiveness based on the current functioning of outcomes rather than on following prescribed procedures.
	Respecting every role, giving rank no special privileges, and allocating incentives by merit.
	Rewarding practices that succeed with additional resources, while allowing failing approaches to die.
	Conceptualizing quality and excellence as moving targets.

Regardless of the particular non-credit learning program model selected for the restructuring process, a recommended first step for lifelong learning programmers committed to restructuring their organization and program inventories would be conducting a preliminary modeling procedure of IES or contextual evaluation. These processes provide the critical data on organizational structures, internal and external competitors, current programming, and served learner characteristics (Pennington & Green, 1976). This procedure, IES, would provide a snapshot of the unit's internal operational environment, as well as the baseline data of the institutional lifelong learning providers and providers' course inventories. Assuming that the IES is being conducted within the context of Bryson's (2004) strategic planning model, then a concurrent or subsequent External Environmental Scan (EES) would likewise need to be conducted. These data would then be incorporated into a second preliminary procedure, "strategic assessment and planning." Critical to the data collection and analysis of this preliminary program inventory procedure is both an agreed upon typology of the terms used to describe the university's lifelong learning program categories, course packages and course names and an institutional lifelong learning philosophical foundation that will be used by the lifelong learning programming stakeholders during the strategic planning process.

Conclusions from Lifelong Learning Programming Literature Review

Lifelong learning programming on university campuses within the United States is enjoying renewed visibility and attention as the influences of advanced technology and a globalized economy put new pressures on individuals to upgrade skills and

maintain currency within the universal knowledge base. Adult learners who wish to take part in formal studies other than degree programs have grown in numbers and diversified in their interests and learning needs. However, many university lifelong learning systems are ill equipped to responsively and efficiently meet these new demands and service expectations of 21st century learners. Most large, public university lifelong learning programs originated from a simple, informal model originally focused on the single program category of personal enrichment. This model is now too limited to support an organizational framework serving more demanding postmodern lifelong learners.

Over the years, many lifelong learning systems expanded in program scope and in the diversity of their clients, however, in many cases no calculated effort was made to evaluate and restructure their programs to a more sophisticated model appropriate to the challenges presented by technical and cultural change. This is likely, in part, due to the marginalized nature of the lifelong learning unit, an organization dependent on an institution whose primary business is not providing non-degree credit learning activities for adults.

Another factor contributing to the neglect in strategically planning for responsive, adult-centered learning within the university-sponsored lifelong learning system is due to the relatively fragmented nature of the field of lifelong learning practice itself. Relatively few practitioners come to their positions as experienced educators; rather most have followed an administrative track, being promoted into lifelong learning program coordinator positions. This lack of identity as a facilitator of learning results in their minimal participation in the scholarly discourse and informed participation and/or

action in philosophical issues, applying theory and modeling, and strategic planning.

Lastly, lifelong learning terminology is often contradictory, confusing, and applied uniquely by each institution. This lack of a common vocabulary makes it difficult for lifelong learning practitioners to communicate effectively internally with stakeholders interested in improving program relevance and responsiveness as well as externally with colleagues willing to contribute to the discourse.

As learning for life becomes more recognized and accepted as a legitimate university mission, administrators and executives will soon call for a more proactive and reasoned approach to structuring lifelong learning systems in the face of constant change. In most cases, this will require a from-the-ground-up strategic planning process, which, in turn, will suggest the most appropriate organizational and programming model for the individual institution's defined mission. Making a lifelong learning model selection decision is complicated by the fact that existing lifelong learning models, in their identification of sequential program development procedures, assume a clean-slate establishment of the program. Long-existing lifelong learning units must take into account and operate within the confines of established organizational structures and relationships, stakeholder's needs and expectations, and current unit programming.

Individual human response to a changing environment is facilitated through a cognitive process that relies on previously developed sets of knowledge, information, and procedures in order to rationally respond to the circumstances of any particular situation. Endsley and Garland (2000) refer to this cognitive process as situational awareness. In the psychological context of situational awareness, individuals assess

and respond to each decision-making situation against specific, prerequisite information and knowledge requirements associated with elemental factors within the environment in order to accomplish a particular task. Additionally, situational awareness requires immediate access to the procedures required to accomplish the task. Similarly, it should be considered a reasonable expectation that before an institution initiates any process to respond to change it should first be aware of how it is grounded within its existing operational environment. For many university-sponsored programs, documentation of their current operational environment is nonexistent and will require a comprehensive investigation and cataloging of university-wide lifelong learning systems and program packages in order to provide up-to-date situational information to decision-makers.

Many U.S. government departments and agencies, which are essentially non-profit service institutions, have in recent years successfully applied Endsley and Garland's (2000) individual behavioral construct of situational awareness into an institutional procedural process that facilitates decision-making. In many cases, this procedural process employs a proven model of strategic planning. Southwestern University, also a non-profit service providing institution, is in need of a formal decision making process to define and guide its adult, non-degree credit lifelong learning system through the early 21st century. Before strategic planning at Southwestern University can begin in earnest, it will be necessary to develop a procedural framework to gather and organize data regarding its current organizational and environmental operational situation. Bryson (2004) describes this data collection and analysis process as an environmental scan. The institutionalized environmental scanning framework employed

by federal non-profit institutions in developing and organizing decision-making data may have direct application within a higher education institutional context.

Completing a formal process of strategic planning provides the basis for a new organizational beginning for the existing lifelong learning system through the establishment of documented organizational and operational policy, lifelong learning visions, mission, and goals. Through these, stated policies, visions, missions, goals, an informed selection of a lifelong learning programming model can be made.

A suggested method for collecting the organization's internal environmental information necessary to the establishment an institutional situational awareness framework within a university operating structure is provided in the following chapter.

CHAPTER 3

RESEARCH DESIGN AND METHODOLOGY

Research Design

This research describes and executes a procedural process for collecting

programming data from a unique, long-existing university-sponsored lifelong learning

system. This study employed a qualitative research methodology to capture and

integrate those data in a descriptive, narrative report of findings for a single instance

event that can be used by Southwestern University executives and administrators in

their follow-on strategic planning efforts. The study employed three separate collection

processes to gather and consolidate the data; database merging and filtering, a series

of Internet searches and a telephone survey of event coordinators.

These processes are expected to provide a single source digital platform for data

manipulation, allowing the development of reports and tabulations to support a follow-on

strategic planning process leading to the informed adoption of a foundational lifelong

learning program model designed to meet 21st century learner needs. This single

source digital platform is designed to store and organize data elements in order to

identify:

- Which organizational units are providing lifelong learning programming?

- What types of programs they are providing.

- The educational objectives of their programming.

- Student demographics related to the individual programs.

- Unit organizational structures specific to support the lifelong learning

  programming effort.

- Personnel resources necessary to conduct the programming.

- Resulting gross revenues generated through open enrollment, non-degree credit course fees.

Theoretical Framework

The perceived need for this study was grounded in the works of Beder (1989, 1992), Knapper and Cropley (1983, 2000) , Long (1983) and Merriam (1982, 1989, 1992), all of whom have identified and attempted to explain the generally marginal existence on university-sponsored lifelong learning on North American campuses. These authors agree that this marginality results in dysfunctional organizational structures and inefficient programming processes that would be expected as inherent in a subordinate unit not widely recognized as integral to the institution's mission. Because of changing adult learner demographics and learning needs, coupled with increasing market competition within the field of lifelong learning programming, an intervention of some sort is necessary to ensure higher education's leadership and advancement within the field of non-degree credit lifelong learning. University leaders will need to reconsider how lifelong learning fits into their mission and organization and if or how they intend to compete in this evolving educational market.

Rowley, Lujan, and Dolence, (1998) consider lifelong learning program marginalization as a severe liability in providing competitive lifelong learning programming to a more diversified and discriminating adult learner population, now and in the foreseeable future. To remain competitive Rowley, Lujan, and Dolence, (1998) prescribe a formalized process of strategic planning to bring about a more cohesive

institutional approach to lifelong learning programming; with the expectant result of a complete lifelong learning program reorganization and incorporation of a defined lifelong learning policy and operational goals within the university's collective vision and mission statements.

Bryson (2004) and Stufflebeam (2003) have offered some specific strategic planning procedural steps for consideration when applying the strategic planning process within an institutional environment, particularly education. The concepts and processes described by these two authors were influential in the development of the methodology used within this case study of Southwestern University. Specifically, both Bryson and Stufflebeam identify a critical first step in the planning process which forms the premise of this study; a deliberate investigative process to become aware of mitigating factors within the unit's unique operating environment and analysis of those factors as they relate to the organization's vision, missions and restructuring for future participation in non-degree credit, lifelong learning programming. Bryson refers to this process as an environmental scan, a concept he divides further into two sub-categories, external and internal scanning. This study applied Bryson's construct of the internal environmental scan to an existing university-sponsored lifelong learning programming system, evaluate the actual process of applying his concept to a unique, practicing environment, and finally, report on the results and effectiveness of that unique scanning process in a manner useful to practitioners in the field.

Research Environment

This study was conducted on the flagship campus of a large public research

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university in the southwestern United States, referred to throughout this paper as
"Southwestern University." This research study identified and classified all lifelong
learning activities, along with the university units providing those activities, for the most
recently completed and formally documented Academic year 2007-08, August 19, 2007,
to August 18, 2008.

Formal research into Soutwestern's lifelong learning programming was
considered necessary because a significant portion of the annual non-degree credit
lifelong learning events conducted under the jurisdiction of the university are developed
and presented through units other than the designated lifelong learning-providing unit.
Because no single university registration management database system currently exists
to document and report the totality of university lifelong learning programming, a true
estimation of the scope and reach of university lifelong learning programming is nearly
impossible to ascertain at present. This creates roadblocks to effective organizational
restructuring and rational long-range planning.

Within the United States, each university's lifelong learning unit is relatively
unique in its program objectives, organizational structures, process management
systems, terminology, and program offerings. The designated lifelong learning
programming unit of Southwestern University exemplifies a program that has evolved
from the limited Free University model. Over time, its organization and programs have
developed reactively in order to adjust to perceived trends in adult non-degree credit
education rather than developing programming structures based on an existing lifelong
learning programming model. An institutionalized, campus-wide strategic planning
process has never been employed to anticipate and respond to expected changes in

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non-degree seeking adult education. Moreover, throughout the 38-year period of Southwestern's designated lifelong learning unit's development and expansion, other non-related campus units have added to the complexity of the overall university lifelong learning effort by designing, developing, and conducting non-credit learning programs independently, without centralized coordination.

While there is presently an undetermined number of university units providing lifelong learning activities, the university has for 38 years directly supported a branded lifelong learning provider organization, the Continuing Education Center (CEC), with the specific mission of providing lifelong learning programming as defined in this study.

CEC is comprised of two major departments: one, event management; the other, non-credit, open enrollment short courses. CEC employs two sophisticated, registration management database systems, both of which are capable of providing directly transferable data relevant to the outlined research questions. The primary event registration database management package, PeoplewarePro™, is a commercial, ready-to-use system in which every CEC-sponsored event is recorded, along with the associated fee, attendance, and student demographic information.

The second registration database management system residing at CEC is provided through a commercial, online lifelong learning delivery partnership with Ed2Go™, which is designed to capture only those event and demographic data elements directly relevant to the unit's online course inventory.

In addition to the basic event and student demographic data collected through the PeoplewarePro™ system, the Ed2Go™ system also collects and records data on student gender, age, learner objectives, and measures of learner satisfaction. Basic

event and demographic data collected through the Ed2Go™ system is also fed directly into the PeoplewarePro™ system for complete unit event and demographic consolidation within CEC. However, only those events specifically developed and produced by CEC and its partner Ed2Go™ are recorded, and centrally reported annually, as "official" university-sponsored lifelong learning programming.

In addition to CEC as the branded lifelong learning programming provider, the university also maintains a direct relationship with a second lifelong learning provider, the "501(c)(3)," operating in partnership with the university, off-campus, and delivering corporate on-site and open-to-the-public professional-related training. Originally established as a center within the College of Business in 1973, "501(c)(3)" was incorporated as a university foundation in 1983 under tax provision 501(c) (3) as a not-for-profit corporation with its bylaws directing all profits, short of operating expenses, to the university and seating the university's president on its board of directors. Similarly, the president of "501(c)(3)" is an employee of the university, serving as the associate vice-president for lifelong learning. The "501(c)(3)" also employs the PeoplewarePro™ registration management system; however, it is not directly linked nor does it share event or demographic data with the CEC PeoplewarePro™ system. Like CEC, the "501(c)(3)" only tracks event and participant data for those learning programs and activities produced and delivered by the "501(c)(3)" unit and none of its events are consolidated into the university's annual report of lifelong learning programming.

Campus-wide, all learning activities sponsored/sanctioned by the university and conducted live on university property, regardless of credit or non-credit status must be recorded within a centralized facilities management database system referred to as R-

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25. While there is no centralized database management package to specifically collect and consolidate non-credit lifelong learning event and demographic data from all of the many university units providing lifelong learning activities, the R-25 database does have a mandatory reporting field, "not for degree credit," which can be used as a filter for on-campus, non-credit lifelong learning events.

Most of the data elements collected through the PeoplewarePro™ and the Ed2Go™ systems are also collected through the R-25 interface; however, unlike the PeoplewarePro™ system, R-25 does not report event fees and only provides a projected estimate of event participants rather than an actual count of attendees.

Internet-only lifelong learning activities provided by non-designated lifelong learning providers are not recorded in any known database. Internally scanned Internet-only learning events provided course fees and number of sessions per year variables to merge into a consolidated database; however, total number of actual activity attendees is unlikely available from that source.

A significant amount of both Internet delivered learning activities and R-25 data had to be collaborated using a telephone interview survey form. By exporting matching data elements from each of the four individual database systems and spreadsheet data developed from the organizational website survey of lifelong learning activities into a common application format within a Microsoft Access™ database, a relatively complete list of university-wide lifelong learning programming can be compiled.

The resulting data table, the Consolidated Lifelong Learning Programming Database (CLLPD), should provide a reasonably accurate accounting of those university units providing lifelong learning programming, the number and types of

programming conducted by the various university units, and the number and demographic typing of the learners participating in these programs. The CLLPD can also provide a process of data sorting in order to identify those units that are providing learning activities operationally defined as Southwestern University lifelong learning programming from those units providing non-credit informal, youth, restricted enrollment, and/or no-cost learning activities. However, consolidation of existing database files alone was not adequate to accurately answer research questions regarding annual revenue generated through campus-wide lifelong learning programming, nor were they able to provide information on provider units' lifelong learning missions, supporting organizational structures, or the financial and personnel resources necessary to conduct their programming.

To collect this additional information, it was be necessary to develop and conduct a standardized telephone survey document to assist in querying those university units that have been determined as providing learning activities specifically defined as Southwestern University-sponsored lifelong learning programming. One mandatory reporting field in the R-25 facility management database system is "event coordinator." The "event coordinator" provided a logical point of contact to conduct the survey that could provide data addressing organizational and financial issues related to the unit's production of lifelong learning programming.

Through database consolidation of four existing database tables, an institutional website scanning procedure and the conduct of a telephone interview, a comprehensive narrative report on the state of a university's lifelong learning programming for Academic year 2007-08 can be produced.

Methodology

Figure 1 outlines 12 distinct procedures in the development of a CLLPD for

Southwestern University. The completed CLLPD provides the data and data analysis

platform from which to respond to Research Questions 1 and Questions 3 through 8.

Procedural Step 2, "Create Time-Task Log" produced the data for analysis and

response to Research Question 9.

The specific developmental processes and sequencing of this example of a

CLLPD was inferred directly from the author's professional experience as an

educational project manager, lifelong learning programming coordinator, and event

registration database application administrator. It is likewise anchored in deliberate

research of the academic literature in the areas of lifelong learning programming models

and general strategic planning principles and protocols with particular interest in

applying Bryson's internal environmental scanning process comprehensively, in a real-

world environment.

The first procedural step in the development of the CLLPD, "Define Lifelong

Learning," establishes the criteria for determining the inclusion of a provider and their

programs within the CLLPD. As Southwestern University does not have a published

document, defining its interpretation of the concept of lifelong learning programming the

definition offered in Chapter 1 of this study was assumed.

The second procedure, "Create Time-Task Log," is a simple process of creating

a descriptive spreadsheet in order to identify each specific action taken during the

CLLPD development process, including emergent sub-tasks realized only through the

execution of the development process. Development of the time-task log procedure is

undertaken specifically for the purpose of refining the IES procedure and is relevant

only to this prototype study at Southwestern University.

Technically, the task-time log was developed within a simple spreadsheet format

with the intention of documenting the person-hours necessary to complete each

specified procedural step documented in Figure 1.

1. Define Lifelong Learning	2. Create Time-Task Log	3. Develop Database Fields
Institution defines its concept of lifelong learning programming and sets criteria for consideration as a lifelong learning provider.	Create a Time-Task log spreadsheet and record each procedural action step required of the Internal environmental scanning process (IES).	Establish database field names to be captured within the context of the institution's definition of a lifelong learning provider.
4. Create Access Database	5. Identify Source Databases	6. Import Source Databases
Design and establish an Access™ Database table to receive consolidated data. The "Consol-idated Lifelong Learning Pro-gramming Database" (CLLPD)	Identify existing institutional source databases that contain lifelong learning programming fields. Match defined data fields to the CLLDP table and save as Excel™ spreadsheet file.	Import data from institutional source tables and incorporate into the CLLPD.
7. Conduct Website Scan	8. Input Web Scan Data	9. Filter Data
Conduct a scan of the institution's departmental websites employing a defined set of search terms to identify examples of non-credit learning activities offered by the individual centers and departments.	Input found, non-credit learning program characteristics from the website scan directly into the CLLPD as data field variables.	Design and implement query and filtering protocols to identify providers and programs of only those activities defined as lifelong learning programming as defined by this study.
10. Interview Call List	11. Telephone Interviews	12. Complete Population of Database
Using the results of the filtered CLLPD data table create an interview call list for follow-on telephone interviews with identified program coordinators.	Conduct individual telephone interviews with non-credit learning activity coordinator using standardized interview guide sheets to collect data field variables unattainable through existing institutional databases or website scanning.	Input data collected from the telephone interview process directly into the appropriate variable cells of the CLLPD. Design queries and produce reports as requested by strategic planning teams.

Figure 1. IES procedure flow chart.

Additionally, sub-step typologies identified only through the experience of conducting the lifelong learning EIS procedure facilitated categorization and recording them as additional descriptive fields in the task-time spreadsheet as they emerge. The primary, known fields to be recorded in the study's task-time log are identified in Table 6.

Table 6

Task-Time Log Field Descriptions

Field Name	Field Description
Date	Current date for procedure activity
Start Time	Clock time at start of procedure activity
End Time	Clock time at end of procedure activity
Time Expended	Duration of engagement with procedure activity
Primary Procedural Step	One of 12 major procedures identified in Figure 1.
Sub-step Procedure	Descriptive title of a contributing sub-process necessary to complete a Primary Procedural Step

"Develop Database Fields" is the third procedural step and ideally should be developed through the efforts of a designated strategic planning team. Since the data fields selected essentially defined the scope of the IES it is important for the planning team to identify the variables they deem necessary to support follow-on decision making processes necessary for strategic plan development. Since Southwestern University had not initiated a formal strategic planning development process for their lifelong learning programming and no strategic planning team exist, the data fields selected for this study were derived from the vocabulary of the key constructs of the operational definition of lifelong identified in Chapter 1.

"Create Access Database" is the fourth procedural step identified in Figure 1.

and is nothing more than the straightforward technical application of the database

program's established data table development protocols.

The fifth CLLPD development procedure, "Identify Source Databases," is an

investigational process to identify existing institutional data collection systems that may

have data fields relevant to lifelong learning programming. Based on preliminary survey

research (Downing, 2007) many university-sponsored lifelong learning providers employ

their own registration/data collection systems rather than relying on an institutional

enterprise data systems. However, because many institutional lifelong learning

providers provide non-credit learning activities only as a side mission they are unlikely

to maintain a dedicated, formal non-credit registration system. In many cases, and in

particular at Southwestern University, the Registrar's for-credit database system is not

designed to support lifelong learning and is unavailable as a data collection source.

Individuals conducting an IES will need to be attentive to the possibility of using other

institutional enterprise data systems such a facilities management data tables or

requesting access to the web-based demographic/registration collection solutions

employed by the individual lifelong learning activities providers.

In the case of the Southwestern University study data elements were be derived

from four distinct event-demographic database systems, each designed specifically to

capture some portion of university-sponsored learning activities data relative to their

specialized function; the CEC PeoplewarePro™ registration database system, the

Ed2Go™ online learning center student tracking system, "501(c)(3)" 's

PeoplewarePro™ system, and the university's R-25 facilities reservation system. Data

cells that remain empty after the data transfers were filled through the follow-on

telephone interviews procedure.

A description of the completed lifelong learning programming database data fields to be filled from all sources is provided in Table 7, and an example of the actual database table design is provided as Appendix A.

Table 7

Database Fields and Descriptions Employed in the Lifelong Learning Activities Database

Fields Captured through the Database Integration Process	
Field Name	Field Description
Unit	Name of unit providing activity
Event	Event name
Category	Classification of programming type (Enrichment, Workforce, etc.)
Population	Demographic characteristics of programs' targeted learners
Fee	Does the activity charge a fee? (Yes/No)
Fee Amount	Cost of event registration ticket
Revenue	Total gross revenue from activity
Coordinator	Name of event coordinator
Defined *	Does the activity reflect all factors of defined lifelong learning programming? (Yes/No)
Fields Captured through the Telephone Interview Survey Process	
MissionUnit	What is the unit's primary university mission?
MissionLL	Is lifelong learning specifically defined as a unit mission?
Objective	What is the primary learning objective of the activity?
TargetPoP	What demographic is targeted for this event?
REG	Number of registrants
Structure	What unit organizational structures exist to support the activity? (Registration System, Marketing, Staffing, etc.)
PersNum	Number of unit personnel involved in production of lifelong learning activity
PersHrs	Person-hours, expressed as a percentage of total employed hours, expended in direct support of the lifelong learning activity.
PersUPO	For personnel directly supporting a lifelong learning activity specifically, is that responsibility specifically addressed in their UPO-35 job description(s) form?

*   The "Defined" field requires a "Yes" response to each and every factor which defines the term "Lifelong Learning Programming" : mediated, non-degree credit instruction through a set of defined organizational, administrative and methodological procedures, for adults, to generate revenue.

"Import Source Databases" defines the sixth procedural step of the CLLPD development process and represents the technical consolidation process of moving source variables into their defined, matched CLLPD data cells. This process will vary depending on the data transfer protocols available through the providing and receiving database and/or spreadsheet computer applications. In this procedure's database, variables from the four separate organizational databases were tagged, field names matched, and then consolidated into a new Microsoft Access™ database table. Missing data variables on those programs conducted at non-university owned facilities or conducted online and not reported within R-25 were collected through an institutional website scanning process and a follow-on telephone interview with designated learning activity coordinators.

The seventh CLLPD Procedure, "Conduct Website Scan," is intended to identify and capture lifelong learning programming, not conducted by the designated lifelong learning unit, and marketed and/or conducted solely through the individual university-unit's website. Because online learning activities do not employ university facilities, they are not required to report through the R-25 reservation system and essentially remain unnoticed as university-sponsored lifelong learning programming.

The scan of the institution's organizational website was conducted through a systematic keyword search using the keywords identified in Table 8. The data gathered through the institutional website scan process needed to be manually entered directly into the appropriate data field within the CLLPD table through procedure eight, "Input Web Scan Data." Because the online methodology of program advertising and registration is unlikely to produce directly collectable information on student participation

numbers or an outline of the unit's organizational and personnel resources dedicated to

lifelong learning the process of telephone interviews with the assigned lifelong learning

event communication with the coordinators was necessary to provide complete

information on the providing unit's activities on the Web.

Table 8

Institutional Website Keyword Search Terms

Lifelong Learning
Continuing Education
Non-Credit Courses
Not For Degree-Credit
Non-Degree Courses
Continuing Professional Education
Professional Development Courses
Personal Development Courses
Career Development Courses
Professional Certification
Certification Courses
Continuing Education Units
CEU Credit

CLLPD Procedure 9, "Filter Data," is the first process providing data to

specifically respond to the study's research questions, specifically Question 1, "Which

campus units, not specifically identified as the designated open enrollment, non-degree

credit learning provider conducted not-for-degree-credit learning activities in Academic

year 2007-08?"

With the entry of available web scanned programming variables such as program

name, price, dates, registration prerequisites and program coordinator names into the

CLLPD, the process of identifying the institution's possible lifelong learning

programming units is considered complete and a report of learning activity providers

can be produced and the process of filtering out those units not meeting the operational

definition of a lifelong learning providing unit can begin. This initial filtering process was

conducted on the "population" and "fee" data fields and identified, then "hid" those

activities and providers not fully meeting the operational definition construct of "deliver

lifelong learning to adults" and "for a fee with the specific purpose of generating

revenue."

At this stage of the procedure, organizational data not recorded within the fields

of the four structured databases or available from the unit website scan needed to be

collected through a telephone survey of the learning event managers. Procedural Steps

10, "Interview Call List" and 11, "Telephone Interviews" provide for this process. The

report produced as a result of the CLLPD filter of defined lifelong learning activity

providers provides fields for the name of the learning activity coordinator and that

person's telephone number and serves as the formal "Interview Call List."

The "Telephone Interview" procedure employs a standardized form, an example

of which is provided at Appendix B. Each interview was completed on an individual

form. As with the variables collected through the website scan process, results from the

telephone process was coded manually directly into the CLLPD. The completion of the

"Telephone Interview" data entry results in achieving final goal of the CLLPD

development process, Step 12, a completely populated lifelong learning activity and

programming database.

The procedures and processes of event, student, and provider identification and analysis described as CLLPD development is intended to serve as a demonstration of the proposed lifelong learning program strategic planning step, IES, as well as serving as a working document for the Southwestern University.

The procedures for data collection at Southwestern incorporated 12 primary procedural steps. Procedural steps 3 through 9 of CLLPD development; identification of sources, database structure development, source data variables exportation, consolidation, and filtering are necessary prerequisites to begin the final three processes; developing an interview list, conducting survey interviews, and survey data integration into the CLLPD.

Procedural Step 2 "Create Time-Task Log," is conducted concurrently with all other CLLPD development procedural steps. This time-task process is designed to collect data on the execution of the CLLPD development process itself, capturing data on the scope of effort necessary to complete the various individual steps and to provide descriptions of any emergent sub-processes necessary to complete an IES modeling procedure.

<center>Data Measures and Analysis</center>

Database Capture and Consolidation

Capturing, consolidating and filtering data from the four identified independent database systems, scan of the university's organizational website and integration of the results of the telephone interview process into common Access™ database application

provides for a single source documentation system capable of responding to research Questions 1 through 8.

Lifelong Learning Programming Database Design and Development

The Microsoft Access™ database application was used as the engine for consolidation. However, there is no directly compatible database file format common to all four of the database sources. Of the four database systems to be consolidated, only the R-25 system was inherently compatible with the Microsoft Access™ database file system. The two independent PeoplewarePro™ systems utilized by CEC and "501(c)(3)" operate on a proprietary system of tables built upon a FoxPro™ database engine that does not support any database file format other than its own. However, PeoplewarePro™ does allow data exportation as a Microsoft Excel™ spreadsheet file. These spreadsheet data were fully compatible and directly transferable to the proposed consolidated Microsoft Access™ university lifelong learning programming database table.

Likewise, the proprietary database reporting system provided through the Ed2Go™ online partnership allowed only for data exportation through an intermediate Microsoft Excel™ spreadsheet file interface.

The R-25 database provided the foundation for the university lifelong learning programming database through a "non-credit" data field query report run on the R-25 system and then saved as a new table in a Microsoft Access™ database file format. Data from the three other databases were imported to the new database file as matched Excel™ spreadsheet data fields.

Because CEC records its lifelong learning programming in both its own

Peopleware™ event-registration database and in the university's R-25 event-facilities

database, there was a double entry for each CEC activity. Once all the contributing

databases/spreadsheets were consolidated into the university's lifelong learning

programming database, a simple sorting scheme was used to group CEC event names,

identify duplicate entries and delete the twice-reported rows. Once complete, this

database identified all sponsored/sanctioned non-credit learning activities conducted at

the university for academic year 2007-08.

Data Sort and Programming Provider Determinations

The consolidated university lifelong learning programming database provided a

reasonably accurate accounting of all not-for-degree-credit learning activities

sponsored/sanctioned by the university for Academic year 2007-08. However, this

study and particularly Research Question 1, is concerned primarily with those units

providing lifelong learning as defined within this study. A series of data field sorts

queried on the fields linked to keywords within the study's definition of lifelong learning

programming, "Event Description," "Fee," "Fee Amount" and "Student Population

Source," produced a listing of those university units engaged in lifelong learning

programming as defined and   provided a response to Research Questions 1, 2 and 7.

A report run from this query identified the activity coordinators and telephone numbers,

thus providing the list of telephone interview survey participants necessary to conduct

Study Procedures 10 and 11, telephone interview surveys.

Telephone Interview Surveys

An additional information gathering process was necessary to collect data on the organizational missions, structures, and personnel resources to be included as nine data fields within the consolidated university lifelong learning programming database. These data are not incorporated within any of the four databases to be merged, nor can any narrative source document containing this information be identified. To capture these data, an original survey questionnaire was employed. Considering the straightforward nature of the survey questions, the expected limited number of survey participants, as well as the local distribution of all potential participants, a telephone-based interview questionnaire is considered the most responsive and efficient method of data collection. Each question on the survey was assigned a data field name matched to a corresponding field in the consolidated university lifelong learning programming database. An example of the proposed telephone interview form is provided in Appendix B.

Telephone Survey Data Integration

Once complete, the collected data from the telephone interview survey process must be manually entered into the consolidated university lifelong learning programming database. At the conclusion of this process, the consolidated university lifelong learning programming database was considered complete and, through a series of queries and reports, capable of responding to Research Question 6, "What are the fees and revenues generated through a unit's programming?," and Research Question 8, "What

organizational missions, structures and staffing support the unit's lifelong learning programming?"

Final Database Sorts and Reports

The flexibility inherent in a relational database system allows for a number of queries relevant to addressing Research Questions 3, 4 and 5, isolating key data points such as program type, number of student participants, description of student populations, and programming revenues and expenses. The completed consolidated lifelong learning database was evaluated across three primary lifelong learning programming elements: *Event Programming*, the identification, categorization and cataloging of all university-sponsored/sanctioned lifelong learning events; *Program Participants*, the demographic characteristics of served lifelong learners and linkages to specific activity programming, along with the number of students participating in each event within the designated academic year 2007-08; and *Programming Organizational Support*, financial and personnel resources necessary to support a lifelong learning activity, along with the identification of any documentation directing the unit's lifelong learning mission.

Once isolated, factors can be compared across any one or all of the campus units providing lifelong learning programming. University planners can, in turn, use the data generated from these queries and reports to initiate a comprehensive university lifelong learning strategic planning process, followed by the selection and long-term application of a structured lifelong learning programming model, resilient and responsive to emerging lifelong learner needs.

Refining the IES Procedure

Development of the task-time log directly supports Research Question 9, "What is the scope of effort necessary to complete the IES procedure?" It provides a method to record the specific procedural steps, planned and emergent, necessary to complete the IES procedure. Data generated through the implementation of the task-time log process was used to refine the mapping of the IES process steps for more generalized use in the field.

It is reasonable to assume that other universities with lifelong learning units hastily established during lifelong learning's higher visibility years of the late-1960's and mid-1970's are, or soon will be, investigating program restructuring options to better meet the needs of their served constituencies. Research Question 9 specifically anticipates the potential roadblocks to the initiation of any program's restructuring efforts; primarily, identifying the time and personnel necessary to implement a IES modeling procedure.

Through the process of developing and recording specific IES process actions via a study procedures process management spreadsheet, the specific sub-steps, the scope of effort and the supporting resources necessary can be defined and replicated. Program managers and university planners leading other similar programs can use these findings as a guide to evaluate the potential value-added of the procedure within their own lifelong learning restructuring process and efficiently assign personnel and resources to the effort. While the calculations and reports from this study's procedures process management plan was specific to the university studied, it identified in a generalizable manner the specific procedural steps within the IES lifelong learning

programming modeling procedure, as well as provide a typology and listing of the

detailed sub-steps necessary to complete the process.

CHAPTER 4

FINDINGS

Executing the internal environmental scanning procedures described in Figure 1 of Chapter 3 produced over 2,625 lines of observations within the developed CLLPD from the previously identified data sources:

- R-25 Facilities Management Database   - 2,289 observations.

- CEC (Peopleware and Ed2Go)   -   47 observations.

- "501(c)(3)"   -   49 observations.

- University Website Survey Process   -   240 observations.

After an initial sorting process, 96 duplicate entries were identified and deleted. Another 2,274 observations were deleted intuitively as not being defined lifelong learning programming based on presented program descriptions. These obviously described events such as enrolled degree-seeking student extracurricular learning activities, student social activities, faculty/staff meetings, dissertations seminars, and the like.

A series of sorts and filters on the "served population' data field eliminated another 129 observations from the CLLPD based on disqualifying variables within the fields of "higher education student" (44), "faculty/staff" (44), and "youth" (41).

A sort and filter on the "fee" field with a variable of "no" eliminated another 147 lines of CLLPD observations. One hundred eighty-seven data lines remained to be investigated and confirmed as potential non-degree credit lifelong learning events through another website survey and/or the telephone interview process. These

remaining event titles were sorted on the "event provider" data field, and a direct search

of the provider's website followed in order to locate direct evidence and additional

information on the activity listed in the associated "event" data field in the CLLPD.

This process identified 18 university units providing 187 open enrollment, non-

degree credit learning programs. After the application of the telephone interview

procedure, a result of 12 university units providing a total 127 programs generating

roughly $5,300,000.00 outside of the university designated lifelong learning unit's

programming was confirmed.

Research Question 1. Which campus units, not specifically identified as the designated open enrollment, non-degree credit learning provider conducted not-for-degree-credit learning activities in Academic year 2007-08?

During academic year 2007-08, 17 university units other than the designated

lifelong learning provider unit sponsored and administered open enrollment, not-for-

degree-credit learning activities for adults. These units are identified in Table 9. Of

those units, 12 met the operational definition of lifelong learning discussed in Chapter 1

of this paper. Additionally, the quasi-university unit, the "501(c)(3)" conducted a

substantial number of lifelong learning activities under its own brand while delivering its

net profits to the general university fund. Table 9 identifies these 12 lifelong learning

provider units and their sponsoring organizations.

Table 9

University Units Providing Non-Credit Learning Activities

Unit or Program	Parent Organization	Primary Mission
Animals for Therapy Center	College of Education	Train volunteers & professionals
Center for Music Educators	School of Music	Professional development for music educators
Distance Learning Support Center DeskTop Learning	University Provost	Provide learning technologies and technical support
Business Education Center	College of Business	Open Enrollment Non-degree credit learning activities for professionals
Parent Education Center	College of Education	Provide education leading to degree
Center for Children with Special Needs	College of Education	Research, training, publication, & counseling services
Center for the Advancement of Public Administration	School of Social Services	Open Enrollment Non-degree credit learning activities for professionals
Program in Gerontology	School of Social Services	Open Enrollment Non-degree credit learning activities for professionals
School of Music	School of Music	Provide education leading to degree
Department of Educational Technologies	College of Education	Provide education leading to degree
Department of Human Behavior	School of Social Services	Provide education leading to degree
Department of Communication Studies	College of Arts & Sciences	Provide education leading to degree
Department of English	College of Arts & Sciences	Provide education leading to degree
Department of History	College of Arts & Sciences	Provide education leading to degree
Department of Philosophy	College of Arts & Sciences	Provide education leading to degree
Program in Social Support Services	School of Social Services	Provide education leading to degree
Riverside Education Center	Applied Sciences Center	Public education branch of the University's Environmental Programs
Office of Equity & Diversity	University Provost	Develop a supportive environment for a culturally diverse faculty, staff and student body
Program in Women's Studies	College of Arts & Sciences	Provide education leading to degree
"501(c)(3)"	"501(c)(3)"	Open Enrollment Non-degree credit learning activities for professionals

Research Question 2. From the list of all units providing open enrollment, non-degree credit learning activities uncovered through the processes of Research Question 1, which units are providing programming as operationally defined in this paper as lifelong learning programming, retaining staffing and organizational structures to support those activities as a unit mission?

The critical factors determining formal lifelong learning programming identified in this study's operational definition of university-sponsored lifelong learning was a set of defined organizational, administrative, and methodological procedures that seek to promote and deliver lifelong learning to adults outside of the traditional degree granting organization. Additionally, this learning was to be offered for a designated fee with the specific purpose of generating revenue in exchange for a specific lifelong learning programming activity. Through a process of sorting and filtering the CLLPD on the field variables "open enrollment," "adult," "fee," "mission," and "UPO-35," the results of this process produced a list of 12 University units meeting all of the defining criteria of a university-sponsored lifelong learning unit. Table 10 lists these units along with their parent organization.

Table 10

University Units Providing Operationally Defined Non-Credit Learning Activities

Unit or Program	Parent Organization
Animals for Therapy Center	College of Education
Center for Music Educators	School of Music
Distance Learning Support Center DeskTop Learning	University Provost
Business Education Center	College of Business
Center for Children with Special Needs	College of Education
Center for the Advancement of Public Administration	College of Social Services
Program in Gerontology	College of Social Services
Program in Social Support Services	College of Social Services
Department of Human Behavior	College of Social Services
Educational Technologies	College of Education
College of Music	College of Music
"501(c)(3)"	"501(c)(3)"

Research Question 3. For those units identified from the process results of Question 2, is lifelong learning programming a primary or secondary mission?

Table 11 identifies the primary university mission of those units providing defined lifelong learning activities. All of the 12 units have formally acknowledged the lifelong learning mission as a primary or secondary function. Eight non-designated lifelong learning providers, fully 75%, specifically identified the mission of providing non-degree credit, lifelong learning as their primary organizational purpose in the unit's mission statement. Two units, Center for Children with Special Needs and Department of Human Behavior cited open enrollment, non-degree credit event production as a secondary mission for their organization. For these two units, lifelong learning programming was primarily organized to provide a venue for their degree-seeking students to practice learned professional skills within a controlled, yet real-world environment. Three of the non-designated lifelong learning providing units' primary mission was specifically identified as offering formal course work leading to a degree. However, each of these three had employed dedicated staff and had established specific organizational structures to offer open enrollment, non-degree credit registration, and participation in their degree program courses to the public. For these hybrid courses, a different, reduced enrollment fee was charged to the lifelong learners along with a streamlined registration process. Within this scheme, non-degree seeking lifelong learners were only given access to class presentations and materials and not afforded any of the campus privileges of degree seeking students such as library access, student identification, or institutional information systems and tech support.

Table 11

Lifelong Learning Mission Level by Defined Providing Units

Unit or Program	Lifelong Learning Mission
Animals for Therapy Center	Secondary
Center for Contemporary Studies in Music Education	Primary
Distance Learning Support Center DeskTop Learning	Primary
Business Education Center	Primary
Center for Children with Special Needs	Secondary
Center for the Advancement of Public Administration	Primary
College of Education Educational Technologies	Secondary
College of Music	Secondary
College of Social Services Program in Gerontology	Primary
School of Social Services Program in Social Support Services	Primary
College of Social Services Department of Human Behavior	Primary
"501(c)(3)"	Primary

Research Question 4. What was the learning activity provided?

The values in Table 12 clearly show that more than 75% of all open enrollment learning activities offered by non-designated lifelong learning providers were focused on providing formal educational activities designed to upgrade or update existing professional knowledge.

Together the 12 units and organizations providing defined non-degree credit lifelong learning opportunities offered 128 different events and/or course packages. All of these activities fell into only five of the available 14 standardized learning activity category variables within the "learning category" field of the CLLPD. The learning activity category and the statistical representation of that category with the group of non-designated lifelong learning providers are provided in Table 13. The full lists of learning category variables are identified in Appendix D.

Table 12

Distribution of Learning Event Categories among Non-designated Lifelong Learning Providers

Event Category	% Rep	Category Providers
Professional Development (Business)	50.4	"501(c)(3)"; Business Education Center
Professional Development (Accounting)	18.6	"501(c)(3)"
Career/Professional Certification	17.8	"501(c)(3)"; Technology Applications in Teaching Department; Department of Human Behavior; Distance Learning Support Center; Program in Gerontology
Professional Development (Educators)	6.5	College of Music; Center for Music Educators; Distance Learning Support Center
Personal Enrichment	6.5	Parent Education Center; Center for Children with Special Needs; Department of Human Behavior
PC - Database	0	
PC – Web Design/Graphics	0	
PC – Hardware	0	
PC – Office Productivity	0	
PC – Introductory Skills	0	
Academic Test Preparation	0	
Writing Skills	0	

This finding tends to confirm the observations of Crick & Wilson (2005), Jarvis (1999), Nasseh (1999), and Rowley, Lujan, & Dolence, (1998) who have identified continuous skill upgrading as a priority need of contemporary lifelong learners. Even the few personal enrichment activities represented in the distribution of learning categories were directed toward the development of professional vocabulary and skills for individuals working with volunteer organizations or for more productive parent-counselor/therapist interactions when dealing with special needs families. Almost 20% of the lifelong learning opportunities offered by non-designated learning providers were in the area of career skill development supporting the literature finding that adult learners' needs to return to formal educational environments in order to remain competitive within an evolving global climate (Crick & Wilson, 2005). In contrast, the learning event categories of designated lifelong learning provider, CEC, tended toward

personal enrichment, PC application/hardware skills, career certification, academic test

preparation, and development of a wide range of writing skills.
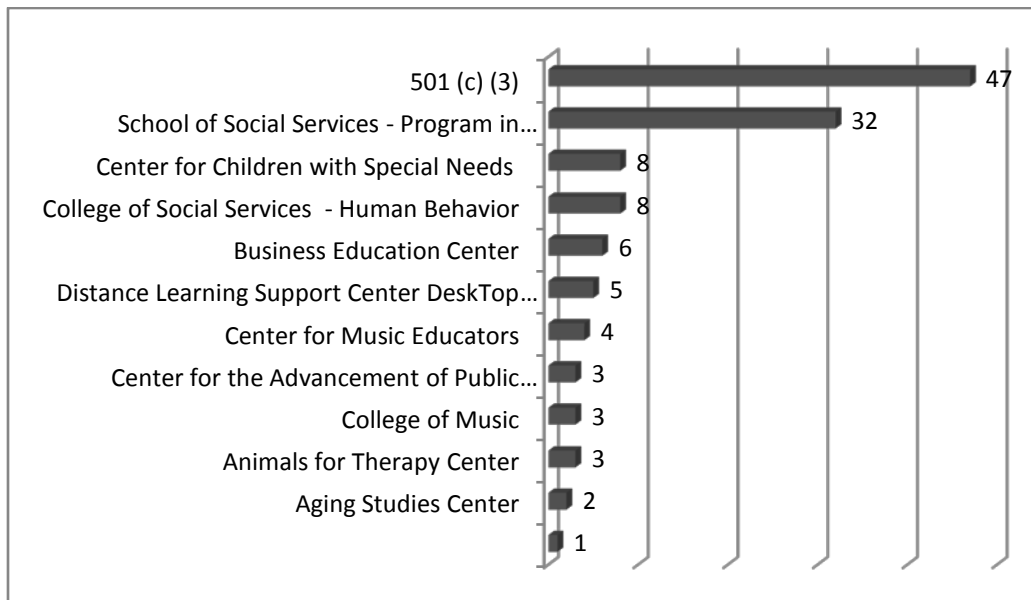
Figure 2. Number of non-degree credit learning programs offerd by providing unit.

Of the 128 lifelong learning activities/programs offered by these 12 units, 62%

were provided by two units, "501(c) (3)" and the College of Public Affairs and

Community Service's Department in Rehabilitation, Social Work, and Additions.

Moreover, three other departments within the College of Public Affairs and Community

Service's accounted for another 10% of the overall programming totals. With the

exception of the two aforementioned programs, on average defined, non-designated

lifelong learning providers produced about 4-5 program events during the academic

year 2007-08. Figure 2 provides detail on the distribution of produced courses among

the identified non-designated lifelong learning providers.

Research Question 5. What was the learning objective of the activity?

All of the learning events provided by the defined, non-designated lifelong

learning providers formally cited the acquisition of knew knowledge and/or skills through

a formal interaction between instructor and student as a specific objective of their learning programming. Learning objectives for each identified activity by event provider were recorded in the CLLPD citing the primary course objective identified by the event provider's program syllabus.

The professional development (business & industry) events, produced predominantly by the "501(c)(3)" and Business Education Center, were generally oriented toward the dissemination of new information and keeping practitioners abreast of new knowledge and trends within a designated professional field. University research and learning centers, particularly those sponsored by the College of Education and School of Social Services, offered coursework whose objectives tended more toward the development of new professional skills or hands-on training in advanced or specialized process techniques related to professional fields of study in counseling and behavior analysis.

All of the research and learning centers identified as defined non-designated lifelong learning providers offered one or more learning opportunity oriented toward the objective of fulfilling annual continuing education unit (CEU) requirements for members of professional associations. The College of Education, School of Social Services, and "501(c)(3)" all offered one or more learning events whose primary educational objectives were an initial professional certification.

Unlike the university's designated lifelong learning provider's initial career certification programs, which were oriented toward career changers with no prior experience in the field, all of the defined non-designated providers, with the exception of "501(c)(3)," only offered career certification to students who possessed formal, existing

credentials within the specialized field. The three defined non-designated lifelong

learning providers offering personal enrichment programming, Center for Children with

Special Needs, Parent Education Center, and Animals for Therapy Center all oriented

their learning programs towards interactive, hand-on training with the objective of

developing specific interpersonal and/or therapeutic skills. Only Southwestern

University's designated lifelong learning provider, CEC, offered personal enrichment

courses which could characterized as supporting "learning for the sake of learning."

Table 13 outlines the primary learning objectives for each non-designated lifelong

learning provider's programming.

Table 13

Primary Learning Objective of Learning Activities by Providing Unit

Unit	Learning Objectives
Animals for Therapy Center	Skill Development–Animal Handling
Center for Music Educators	Professional Continuing Education Required Professional Association CEU's
Distance Learning Support Center DeskTop Learning	Professional Continuing Education Preparation for Professional Certification Required Professional Association CEU's
Business Education Center	Professional Continuing Education
Center for Children with Special Needs	Professional Continuing Education Required Professional Association CEU's
Center for the Advancement of Public Administration	State Required Annual Refresher Training
College of Education Technology in Teaching	Preparation for Professional Certification
College of Music	Professional Continuing Education Required Professional Association CEU's
College of Social Services Program in Gerontology	Preparation for Professional Certification
College of Social Services Program in Social Support Services	Professional Continuing Education Required Professional Association CEU's
College of Social Services Department of Human Behavior	Professional Continuing Education Required Professional Association CEU's
"501(c)(3)"	Preparation for Professional Certification Professional Continuing Education Required Professional Association CEU's Test Preparation

Research Question 6. How can the characteristics of the population participating in the earning activities best be described?

In the case of all of the defined non-designated lifelong learning providing units, served populations are wholly determined by the limited availability of existing courses that have emerged from the scholarly work of an individual researcher or research center. Even "501(c)(3)," which now operates quasi-independently as a self-defined lifelong learning agency, originated as a product of scholarly efforts out of the College of Business. Table 14 links learning populations to serving learning activity providers. For the most part, the participants of the non-degree credit learning activities sponsored by defined non-designated lifelong learning providers were college degree holders updating and/or upgrading to very specific skill sets within their chosen professions.

Table 14

Served Learning Population Categories Recorded in the CLLPD by Learning Activity Provider

Unit	Primary Served Populations
Animals for Therapy Center	Mental health clinicians and counselors Interested individuals and community volunteers
Center for Music Educators	K-12 educators (Music studies)
Distance Learning Support Center	Professional librarians (CEUs) Community volunteer librarians (Knowledge & Skills)
Business Education Center	Business and industry professionals
Center for Children with Special Needs	Mental health clinicians and counselors Parents with special needs children
Center for the Advancement of Public Administration	Degreed public administration professionals
College of Education - Technology Applications in Teaching	K-12 educators (Educational technologies)
College of Music	Professional practicing musicians Degreed education professionals
College of Social Services Program in Gerontology	Professional academic researchers Nursing home administrators Nursing home paraprofessionals
College of Social Services Program in Social Support Services	Mental health clinicians and counselors

(table continues)

Table 14 *(continued).*

Unit	Primary Served Populations
College of Social Services Department of Human Behavior	Mental health clinicians and counselors
"501(c)(3)"	Business and industry CEOs and organizational leaders Business and industry Managers Accounting professionals (CEU) Accountants professional seeking certification Human Resources professional seeking certification Entry level career seekers (Paralegals)

While some of Southwestern University non-designated lifelong learning activity providing academic units offered a significant number non-degree credit learning activities throughout Academic year 2007-08 which would appeal to a population primarily interested in attending for purposes of personal enrichment and characterized as "learning for the sake of learning," all these activities were offered free of charge to the general public and incidental to the services provided to enrolled degree-seeking students. Personal enrichment activities of this sort, free and incidental to the support of enrolled degree-seeking students, did not meet the operational definition of lifelong learning as applied within this research. The vast majority of this type of open-to-the-public learning activity originated from the various departments of the College of Arts and Sciences within a venue of distinguished lecturer programming.

Only three defined non-designated lifelong learning providing units appeared to draw students from populations that could be characterized as non-professional and oriented toward emotional self-improvement: the Animals for Therapy Center, which provides knowledge, skill development, and information useful to community volunteers; and the centers for Parent Education and Children with Special Needs, both of which offer open enrollment to parents of special needs children from across the region. However, even though participants from the latter two organizations are drawn from a

wide range of educational, ethnic, and socioeconomic source populations, they are essentially self-narrowing with a very specific learning interest. The "501(c)(3)," which was organized specifically as a stand-alone, non-credit, lifelong learning organization from its inception, appeared to have the most diverse set of served population groups. It offered, in general, five different course packages, all professional and career oriented. The "501(c)(3)" offered courses that could appeal to: non-degreed paraprofessionals seeking new careers as entry support staff in legal and accounting offices; mid-management, degreed professionals in the oil and gas industry; certified accountants; human resources practitioners seeking professional certification; and seminars and workshops for corporate executives in the accounting and the oil and gas industries.

Population	Count
Professional - Rehabilitation	30
Professional - Accounting	26
Professional - Oil & Gas	14
Professionals in Behavior Analysis	8
Professional - Educators - K-12	8
Adult Career Seekers/Changers	7
Professional - Logistics managers and supervisors	6
Parenting and family professionals	6
Professional Librarians	5
Professional - Counseling/ Behavior	4
Professional - State of Texas public administrators	3
Community Volunteers	3
Professional - Retirement Housing	2
Professional - Human Resources	2

Figure 3. Non-degree seeking learning populations with total number of courses offered serving those populations' needs.

At Southwestern University, only the designated lifelong learning organization, CEC, offers a system of programming that draws participants from across the spectrum of adult lifelong learners in terms of personal educational interests and range of learning programming. Figure 3 identifies the populations served by the 12 identified, defined non-designated lifelong learning activity providers and the number of discrete programs offered to serve those populations.

Research Question 7. From the list of units providing defined open enrollment, non-degree credit adult learning activities, what activity fees are associated with each activity, and how much annual revenue is generated.

Instruction for a fee was a key construct in the operational definition of lifelong learning programming within this study. Several university units identified in Appendix C offered educationally enriching programs open to the public and which employed organizational staff specifically to produce these programs. However, there were no fees charged to participants of these learning events and each of the programs received the necessary production resources from a sponsoring college or student development division. In each case, the primary purpose of the activity was to enhance the college experience of enrolled degree-seeking students and financial support of the programming was derived from those student' tuitions and fees. Of the 12 units defined as non-degree-credit lifelong learning providers, nine reported that their programming was wholly reliant on revenues from course fees. Two, and probably three, units offered hybrid degree/non-degree course options that were programmed regardless of the possibility of collecting fees from lifelong learners. One unit chose not to participate in the telephone survey.

Lifelong learning opportunities offered for open enrollment, non-degree credit

through the School of Music, the department of Technology Applications in Teaching within the College of Education and the program of Behavior Analysis at the College of Public Affairs and Community s\Service, were select sets of graduate level degree-credit producing courses. In each case, no degree credits were awarded to the lifelong learning participants, nor could degree credit be retroactively applied to a student record should a lifelong learner participant choose to enroll in a graduate program later. All three of these hybrid programs collected only those fees equal to the semester-hour tuition associated with the course of instruction. These course sections routinely had a mix of degree seeking and non-degree seeking students on the class roster. Representatives from the department of Technology Applications in Teaching did not respond to attempts to include them in the telephone survey, but based upon the information available on their website, it seems reasonable to assume their annual non-degree credit participation would be similar to that of the music and behavior analysis programs, 50 or fewer students and gross annual revenues of $24,000.00 or less.

A second, apparently defined lifelong learning provider, Animals for Therapy Center, also chose not to participate in the telephone survey. Their website did market the availability of their programming to the public and they did advertise a fee. There was no way to estimate an annual gross revenue figure based on the number of participants; therefore, a revenue figure is not reported in Figure 4.

In addition to its hybrid course, the program in Human Behavior offered another course package as part of an independent CEU-producing learning program dedicated to providing non-degree credit education through distance learning. This program, as

with seven others listed in Figure 4, was solely maintained through the revenues received through non-degree credit learning activities.

Individual course fees fell within a very wide range, from $20 for several online short courses for librarians to $2,200 for certification preparation for certified financial planners. For the majority of courses, fees still fit into a relatively broad range of $200 - $700. A detailed listing of course fees by program and program provider is available at Appendix E.

The revenue estimates presented in Figure 4 are based on the number of annual registrations for a particular program reported by the program coordinator during the telephone interview process. Except for one case, DeskTop Learning which provided an exact registration figure, reported registrations were on-the-spot estimates by the program coordinator, with most program coordinators providing estimating accuracy of plus or minus ten.

Two programs, DeskTop Learning and the program in Social Support Services at the School of Social Services, offered multiple, comprehensive, program packages, each with a range of individual course packages. In these two instances, the individual fees of the courses within a package were averaged to produce a single figure multiplied buy all registrations associated with the program package, as the program coordinators did not have the necessary data during telephone interview to provide an estimate of revenue for each individual course section contained in their packages.

Center for the Advancement of Public Administration — $1,920,000.00
501 (c) (3) — $1,086,030.00
Center for Children with Special Needs — $793,780.00
School of Social Services - Program in Social Support... — $631,941.80
Distance Learning Support Center DeskTop Learning — $503,220.00
College of Social Services - Human Behavior — $480,000.00
Aging Studies Center — $213,700.00
Business Education Center — $101,400.00
Center for Music Educators — $45,000.00
Collegeof Music — $24,000.00
College of Education - Educational Technologies — Not Reported
Animals for Therapy Center — Not Reported

Figure 4. Estimated total gross revenues from non-designated lifelong learning providers from courses during academic year 2007-08.

Research Question 8. From the list of units assuming lifelong learning programming as an organizational mission, what staffing requirements are necessary to meet adult learner-centric service needs for the sponsored lifelong learning activity; what organizational and material structures exist to support this lifelong learning programming?

With the exception of one program, Animals for Therapy Center, all of the defined non-designated lifelong learning units employed at least one person within the organization who had a specific job description line item for support of non-degree credit learning programming on their formal, human resources-maintained job description file.

Initially, the "staffing" field variable within the CLLPD was conceptualized as the sum of annual person-hours dedicated to the lifelong learning effort by individual(s) working within the providing unit. However, it became obvious during the telephone interview process that interviewees were more comfortable and confident in discussing

the staffing issue in terms of full-time and part-time dedication to the program. As such,

recording of data on the CLLPD staffing field variable was revised to the recording of a

unit's associated staffing Full-Time Equivalents (FTE) rather than counting individual

performance hours. The basic constructs of this redefined staffing variable appeared

better understood by the lifelong learning program coordinators across Southwestern

University. This change in study design was considered acceptable, one of several

expected, better-defined emergent, secondary procedures developed through the

experience of conducting an actual lifelong learning IES. Other such emergent

secondary procedures are discussed in detail within findings of Research Question 9.

Staffing of the defined non-designated lifelong learning providers varied widely,

from an 0.50 annualized FTE for providers with a secondary lifelong learning mission to

11.00 FTEsfor units established specifically, and solely, to deliver university-sponsored

lifelong learning activities. However, there did not appear be any direct relationship

between program staffing and programming production within the constructs of program

offerings, students served and/or the generated revenue. Comparing the units' FTEs

recorded in Table 15 to the corresponding number of course registrations and

generated revenue reported by the units in Figures 4 and 5, respectively, it was

observed that defined non-designated lifelong learning programming units with relatively

small staffs achieved very substantial production numbers within Academic year 2007-

08 and, in fact, exceeded all others within the group.

The Center for the Advancement of Public Administration with an annualized FTE

of only 1.5 accounted for 37% of all reported registrations and 33% of all estimated

revenues for the reported academic year. The two most heavily staffed programs,

"501(c)(3)" and the department of Human Behavior, with 11 annualized FTEs each, respectively reported 18.7% and 8.7% of total registrations and 6.8% and 6.9% of estimated total revenues. This apparent staff-production inversion was explained through the telephone interview process. The Center for the Advancement of Public Administration's primary operational mission is to support the legislatively mandated annual training requirement for state employees who manage appropriated funds. With fixed learning objectives and a targeted population of over 10,000 potential students annually, the center's staffing requirements need only to address student registration, learning facility management, and instructor coordination.

Looking more broadly at the group of defined non-designated lifelong learning providers, each of the other units declaring a primary lifelong learning mission had recognizable organizational needs for staffing expertise to address issues of curriculum development in the face changing learner needs, management of distance learning infrastructure, and program marketing and messaging in an expanding and increasingly competitive environment.

There was an apparent relationship between lifelong learning organizational support structures and overall program production. As discussed earlier in this chapter, 75% of the defined non-designated lifelong learning programming units reported non-degree credit lifelong learning programming as their primary unit mission. Common to all of these units *organized specifically to provide open enrollment, non-degree credit lifelong learning* were the following support structures:

- Formalized, identified lifelong learning budget line and financial reporting requirement.

- University "Cost Sharing" obligations for support of the specific lifelong learning programming which are met through the development of lifelong learning course fee revenues.

- Staffing formally tasked and recorded through the human resources agency to carry out the lifelong learning mission for the unit assigned.

- Custom curricula designed specifically to meet the learning needs and expectations of the non-degree seeking lifelong learner.

- Online learning software systems and hardware managed independently of the University's distance learning infrastructure.

- A defined lifelong learning program marketing plan.

Unlike the relationship of staffing to the total volume of registrations and revenue of a program's overall production, specific lifelong learning organizational support structures appear crucial if a particular program expects to serve a substantial number of learners and, in turn, produce the revenues necessary to maintain solvency.

Table 15

Organizational Resources Dedicated to Non-degree Credit Lifelong Learning

Unit	FTE Staffing	Lifelong Learning Organizational Support Structures
Animals for Therapy Center	0.50	Curriculum, Instruction, & Staff
Center for Music Educators	2.00	Organized specifically to provide open enrollment, non-degree credit lifelong learning
Distance Learning Support Center DeskTop Learning	3.00	Organized specifically to provide open enrollment, non-degree credit lifelong learning
Business Education Center	1.25	Organized specifically to provide open enrollment, non-degree credit lifelong learning
Center for Children with Special Needs	7.50	Curriculum, Staff, Registration System & Marketing
Center for the Advancement of Public Administration	1.50	Organized specifically to provide open enrollment, non-degree credit lifelong learning

(table continues)

Table 15 *(continued).*

Unit	FTE Staffing	Lifelong Learning Organizational Support Structures
College of Education Technology in Teaching	1.00	Staff & Registration System
College of Music	0.75	Staff, & Registration System
College of Social Services Program in Gerontology	2.5	Organized specifically to provide open enrollment, non-degree credit lifelong learning
College of Social Services Program in Social Support Services	7.00	Organized specifically to provide open enrollment, non-degree credit lifelong learning
College of Social Services Department of Human Behavior	11.00	Organized specifically to provide open enrollment, non-degree credit lifelong learning
"501(c)(3)"	11.00	Organized specifically to provide open enrollment, non-degree credit lifelong learning

Again, comparing the unit data within Table 16 to that of Figures 4 and 5, it becomes obvious that those programs approaching lifelong learning programming as a secondary organizational mission achieve production numbers relatively insignificant in relation to their primary lifelong learning mission-specific contemporaries.

As reported in the response to Research Question 3, the lifelong learning activities produced by those units identifying lifelong learning as secondary mission were primarily established as a means of providing real-world learning experiences for their degree-seeking students. As such, while lifelong learning-centered learning opportunities were offered, for a fee, as open enrollment opportunities to the broad, local community, available seats and resulting revenues were limited to the total number of enrollments necessary to provide learning opportunities for the degree seekers who presided over the open enrollment learning events. Additionally, two of these dual-

purpose programs received external grants, as well as appropriated funds, to support

the associated degree-credit infrastructure that provided incidental support to the

lifelong learning effort. Understandably, marketing and recruitment of learners was

considered unnecessary and, consequently, program growth was not an objective of the

units within this category.
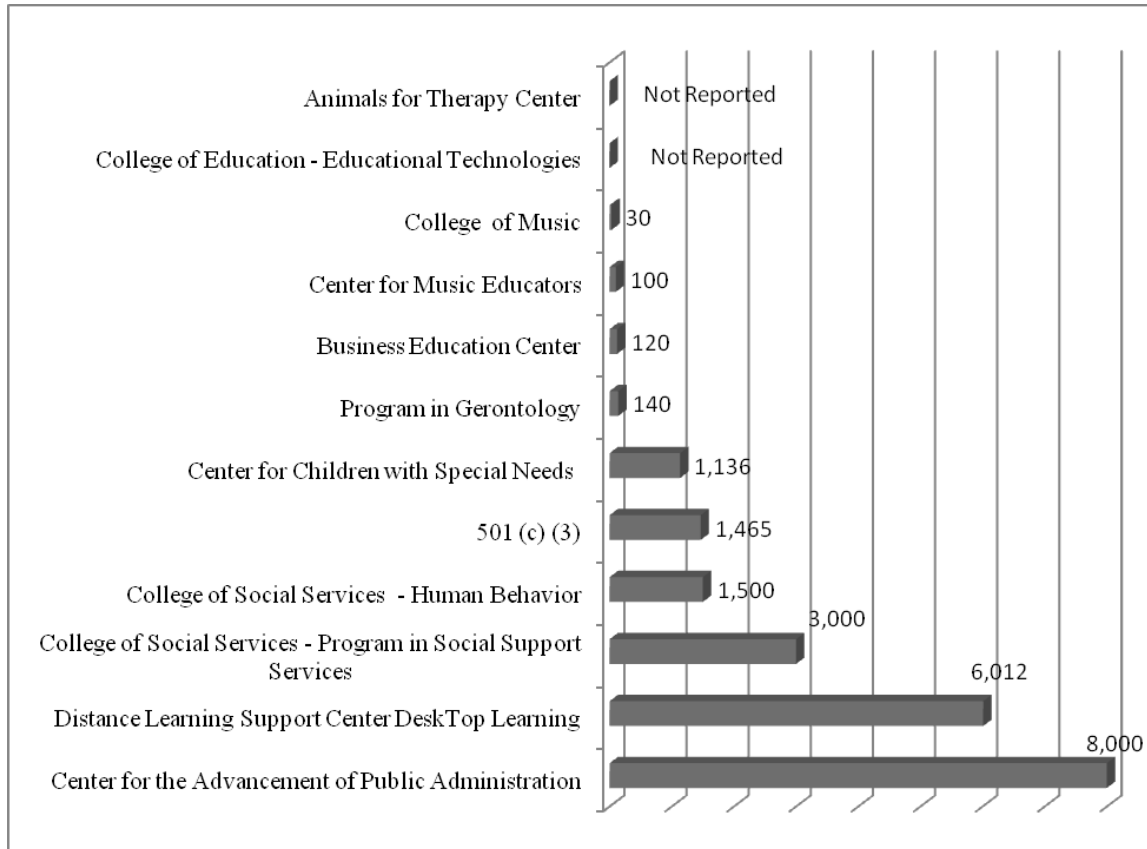
Figure 5. Reported estimates of annual registrations by program.

On the other hand, those defined non-designated lifelong learning units with the

primary mission of providing lifelong learning activities while obligated to produce the

necessary revenues for solvency, as well as contribute their programmed cost share to

the university operating fund, must maintain staff and structures that will ensure a

continuous stream of program participants. Core structures identified by all telephone

interviewees were curriculum management, registration, and student advising, and program marketing.

While the supporting organizational structural requirements appeared to be fairly consistent among those defined, self-supporting non-designated university units with a primary mission of lifelong learning programming, staffing seemed to vary widely depending on the learning delivery method employed, the frequency of curriculum updates, and the anticipated volume of staff-student interactions. It was noted in the results of the telephone interviews with those units having the largest staffs and most comprehensive organizational structures that a supportive staff-student interaction and program marketing were considered core organizational functions and, incidentally, person-power intensive activities resulting in increased staffing levels.

Research Question 9. What are the emergent, secondary procedures necessary to conduct the IES pre-strategic planning data collection procedure?

The preceding research questions were selected to identify and organize descriptive data on the existing lifelong learning programming environment considered as useful to senior administrators and planners in the formulation of a visionary strategic plan for the institutional integration of a university's lifelong learning mission. Research Question 9 was conceptualized specifically as a point of departure for the analysis of the lifelong learning environmental scanning procedure proposed by this study to identify any emergent processes deemed necessary or recommended for the efficient conduct of an internal environmental scan of educational programming by follow-on applications of this procedure.

As proposed, this study identified three major process steps in the execution of

the lifelong learning internal environmental scan procedure at Southwestern University: merging and filtering existing databases known to contain information relative to Southwestern University's sponsored lifelong learning programming; a series of structured Internet searches employing the university's internal search engine, and telephone interview surveys of assumed lifelong learning event coordinators identified through the consolidated databases and/or the internal Internet search process.

In general, the design of the internal scanning process steps detailed in Chapter 3 appeared to have been effective in identifying those university units engaged in educational programming and that appeared to meet this study's operational definition of adult lifelong learning activities. The design of the CLLPD database template, exportation and merging of selected data from the existing tables, and the filtering and sorting of collected programming data was straightforward, essentially dictated by the protocols of the employed software applications. The collection and integration of the data obtained through the telephone interview process was likewise straightforward and unremarkable, employing a standardized questionnaire form with interview questions derived directly from the CLLPD data field titles.

The most significant emergent scanning procedures not considered during the data collection design process dealt with the Internet search protocols involved in surveying the university's website for evidence of lifelong learning programming. One of these emergent scanning procedures appears to have resulted in a more efficient and reliable method for identifying lifelong learning programming. The other emergent Internet search procedure addresses the previously unconsidered issue of university program web page cataloging management.

As initially conceptualized, the scan of the institution's organizational website was to be conducted through a systematic keyword search using the institution's internal search engine and the keywords identified in Table 8 of Chapter 3. This method was indeed employed in the survey of the university's internal web and, while tedious, did produce acceptable results. Each search keyword would produce a results page with each entry highlighting the submitted search term, usually located under a hyperlink header identifying an associated university unit or academic department. Each submitted keyword resulted in hundreds, even thousands, of individual entries, most of which were irrelevant to the study's purpose. It soon became obvious that the most relevant links were grouped around academic department headers with direct lifelong learning programming evidence incorporated into the summation text of the individual search result entry. After completing the keyword search process, the investigator decided to employ an ad hoc data collection validation process, another internal website survey, this time department by department, in order to increase the level of confidence that each university unit had been investigated for potential lifelong learning programming.

The process of surveying for lifelong learning activity by scanning a unit or department's website proved much a more direct and efficient scanning methodology than the keyword search. Additionally, having opportunity to scan the institutional website a second time by a distinctly different methodological approach instilled a much higher level of confidence in the resulting data used to answer questions one through eight.

Using the university's online organizational directory as a hyperlinked search list,

each unit was surveyed in its turn. As a general rule, each unit, or department employed a fairly standard webpage menu based on its organizational purpose within the university, academic units usually had a hyperlinks to "Faculty," "Degrees," "Courses" and, in many cases, "Programs." University and college centers usually had hyperlinks to the center's "Mission," "Staff" and "Courses" and/or "Programs." Auxiliary units would often include hyperlinks to "Events" and/or "Courses" in addition to page links to their staffing and missions. This departmental web search methodology employed an intuitive, menu driven search for evidence based on the implied meanings of the text within the menu headings.

The results of the departmental search methodology identified each of the potential lifelong learning programming events discovered through the keyword search process, plus an additional six potential events missed through the initially-proposed keyword scanning procedure.

A second benefit generated through the departmental search methodology, one identified as an additional emergent secondary procedure, was exposure to the unit mission statements available on many of the center and auxiliary websites that were directly related to various data collection fields in the CLLPD. Initially, it was assumed this information would only be available through the telephone interview process. Because many of the potential lifelong learning events identified in the four source databases had data fields containing all but unit mission, staffing, and organizational structures, this systematic survey by department made it was possible to reduce the number of required phone interviews by over half and produced a significant timesavings in the data collection effort.

Another significant emergent scanning procedure developed through the process of testing the proposed internal environmental scanning process, and deemed essential for the efficient conduct of any future scan, would be the development of some type of website "bookmarking" protocol. The pages of the university's internal website proved to be an invaluable resource, not only for the initial identification of potential lifelong learning programming, but also in providing information on unit missions, staffing, courses, course learning objectives, course fees and targeted populations. During both the keyword and departmental Internet survey methods, the investigator created a "bookmarks" file folder, saving hyperlinked page markers allowing instant future visits to the site for data entry and telephone interview reference.

Later, this method proved to be not only inefficient, but also frustrating and time consuming. Only after engaging in the web survey and data collection process was it recognized that the "bookmark titles" would essentially be dictated by the designer of each website and their use of Meta tagging. In most cases, the protocols used by the designers to identify their page titles were inadequate for easy retrieval when the user is reliant on a list of page titles rather than on a keyword search. Current Hypertext Transfer Protocol (HTTP) allows for the coded entry of a page title (Meta tag), keywords and a descriptive phrase or two for the specific purpose of titling the page for "bookmarking." When these options are not employed, most Internet browser applications will default to the page's Uniform Resource Locator (URL) as the assigned "bookmark" title. In all but a handful of cases, the web pages filed for future use in this study assumed this format protocol, the URL, as the "bookmark" title. The results of this process were unusable bookmarks and the reapplication of the departmental search

methodology in order to relocate the desired page for reference during the telephone interview process.

The solution to this problem was quite simple, yet a dramatic improvement over the previous process; taking the extra step to manually name the page individually rather than relying on the application's automated feature. Once employed, this study applied a "bookmark titling" protocol of "Department," Coordinator," & "Event Name." While the specific titles and subtitles used to bookmark scanned web pages should be developed to suit the individual investigator's purposes, it is recommended that the investigator establish such a protocol specifically in the internal environmental scan design plan.

To a lesser degree, but also related to the series of structured Internet searches, is the realization that the Internet is inherently dynamic and some of the "bookmarked" pages containing information on potential lifelong learning programming can become irretrievable due to host website redesign and elimination of original hyperlinks to the source URL. This proved to be the case for several HTTP pages "bookmarked" for this study. A third protocol suggestion arising from the execution of this study's implementation of the internal environmental scanning procedure would be to take advantage of most Internet browser's option of "Save As"; creating a folder on the investigator's PC workstation and saving the entire page, again with an investigator-determined titling protocol. A complete list of the primary, planned secondary and emergent secondary procedures, along with an estimation of the elapsed time necessary to complete the task, is provided at Appendix F.

CHAPTER 5

CONCLUSIONS AND RECOMMENDATIONS

Discussion of Findings

The specific purpose of this descriptive case study was twofold. The first

component was to identify the specific IES processes relative to lifelong learning

programming. The second element was to determine if these processes are adequate

to collect, classify, and organize programming data into a single-source document that

describes the internal organizational and programming environment of a given unit

operating without a guiding strategic plan or current programming model. The results of

this IES process research were expected to provide public university planners a tested

set of scanning procedures, directly relevant to non-degree credit lifelong learning

programming, and intended to be used be used in conjunction with the development of

an institutional strategic plan that incorporates lifelong learning within the university's

academic mission. Therefore, the primary design feature of this research project was

the cataloging, describing, and reporting on the specific process steps, planned and

emergent, in the IES modeling procedure in order to refine and improve the process for

use by other lifelong learning programmers.

Secondarily, the resulting institution-specific database reports generated from

this evaluation of the IES procedure at Southwestern University were intended to be

practically applied by that particular institution's administrators and planners in the

development of a unified lifelong learning mission, vision, strategic plan and, ultimately,

a more robust and responsive lifelong learning program model.

Southwestern University provided an appropriately challenging research venue

for the evaluation of the IES in that its designated lifelong learning provider unit was

marginalized within the existing university, operating in an environment where lifelong

learning was not an acknowledged mission of the institution. The designated lifelong

learning unit organized and conducted its operations in the absence of a defined

programming model, and no assessment of the institution's lifelong learning

programming systems had be conducted in its 37 year history. In addition, and of

particular interest to this research, was the recognition that an unknown number of other

university units within the institution were conducting lifelong learning activities

independently, sometimes in direct competition with each other, without any centralized

oversight, coordination, or consolidated reporting.

Research Questions 1 through 8 were conceived to serve as realistic data

collection exemplars to evaluate the effectiveness and efficiency of this prototype

lifelong learning IES procedure within the operational environment of a long-standing

lifelong learning system. These eight research questions were derived from the

common, recurring lifelong learning programming factors discussed throughout the

lifelong learning program modeling literature; type of activities offered, activity selection

process, activity objectives, served populations, organizational missions, organizational

structures and dedicated lifelong learning staffing (Long, 1983). These questions were

selected and organized intuitively based upon the professional experience of the

primary investigator who had served for a decade as a university-sponsored lifelong

learning program coordinator.

Research Question 9 was conceived specifically to evaluate the effectiveness of

the IES in responding to data collection exemplars.

The majority of university-sponsored lifelong learning programming providers within the United States are expected to structure their programs in order to achieve a reasonable return on the investments in organizational support and staff compensation to the sponsoring institution. Increasingly, lifelong learning programming is being used as a generator of substantial unrestricted income for institution by senior administrators. However, entrepreneurs within the for-profit sector of lifelong learning, conducting the business of lifelong learning specifically and strategically, offer stiff competition to programs operating without a well-defined plan or operational model.

Like many of its peers, Southwestern University is looking to its designated lifelong learning unit to increase its annual revenues substantially in Academic year 2008-09, specifically, within a range of 400% to 500% more than those revenues reported in Academic year 2006-07. Also, like many of its peer institutions, this mission of revenue generation through lifelong learning programming is not reflected in any guiding mission statement document, nor is there a formally drafted strategic plan objective for lifelong learning or an organizational directive assigning responsibility to meet the proposed goals. Moreover, while it has been recognized by some of the lifelong learning staff that other lifelong learning activities are being conducted outside of the designated lifelong learning provider's purview, no single source documentation exists to estimate the overall impact of these activities on the current generation of revenue or the impact such activities would have on the uninformed restructuring of only the designated lifelong learning provider. In order to effectively plan and establish reasonable production goals, administrators must fully understand and acknowledge the present. The lifelong learning IES was conceived to provide these administrators the

data necessary to make those planning judgments.

Research Questions 1, 2, and 3 established the environmental scanning variables to define the extent of lifelong learning activities being conducted outside the purview of the university-designated lifelong learning provider and to identify the providers of those activities. The identification of non-designated lifelong long learning providers was of particular interest in the application of the IES at Southwestern University. While it was commonly known that lifelong learning activities were being conducted beyond the scope of the designated lifelong learning unit, the extent of that programming was unknown.

The application of the prototype IES process accurately identified those units and effectively discriminated between those units whose programming was considered non-degree credit lifelong learning, as operationally defined within this study, from those whose programming did not. Through the application of the IES process at Southwestern, it was discovered that in addition to the designated lifelong learning activities provider, 12 other units conducted lifelong learning activities during Academic year 2007-08. Prior to the conduct of the IES process, only three of those 12 units had been recognized as lifelong learning activities providers. The remaining nine providers were discovered specifically through the IES process. None of the 12 units revealed through the IES process had ever contributed input data to the annual university lifelong learning report. Therefore, Southwestern University's actual lifelong learning programming has consistently been underreported to the stakeholders concerned.

While programmer identification may not yield as significant a result for many universities, research conducted by Downing (2007) identified six of Southwestern

University's comparable peers as institutions that are operating lifelong learning systems with multiple activity providers. The IES process modeled here could likely provide similar results for those institutions whose lifelong learning system has become dispersed over time.

Research Questions 4 and 5 were designed to capture all of the non-degree credit programming activities during Academic year 2007-08. Again, the IES revealed consistent underreporting of lifelong learning programming by Southwestern University. Startlingly, 76% of the total annual non-degree credit lifelong learning activities conducted by Southwestern University during Academic year 2007-08 were not sponsored or produced by the designated lifelong learning provider unit. The majority of these activities were in direct educational support of very specialized professions and the programming was designed to disseminate new knowledge developed through the providing unit's associated faculty. Some redundancies in programming and course content overlaps were identified between several of the programs. This application of the IES demonstrated that the process could be used to improve program coordination and efficiencies as part of a more routine organizational assessment program as well as part of an institutional strategic planning process.

Research Questions 6, and again Research Question 5, were conceptualized to identify the learner populations attracted to the individual lifelong learning activities and the learning outcomes they sought. Unlike the University designated lifelong learning activity provider, 11 of the 12 non-designated lifelong learning activity providers marketed their programming to very narrowly defined learner populations, the degreed professionals conducting fieldwork derived from the academic discipline of that lifelong

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learning activity provider. Only the "501(c)(3)," which was specifically conceived to generate a stream of revenue through lifelong learning programming, actively marketed to a relatively broad base of "adult learners." The remaining 11 generally offered only post-degree professional certification packages or learning activities designed to produce professionally required annual continuing education units (CEU).

Based upon the telephone interviews with the learning provider coordinators, their lifelong learning programs generally originated from the desire to apply the scholarship of their associated faculty to the field of practice rather than a specific initiative to create a university revenue stream. In contrast, the program packages of the University designated lifelong learning provider were specifically designed to attract learners from a very broad, diverse regional population with dozens of learning objectives within an unstated programming philosophy of personal enrichment.

Interestingly, the results of the IES forcefully confirmed the literature in the area of perceived student needs and current student demands for relevant programming. Fully 98% of the coordinator-estimated annual registrations for Academic year 2007-08 were for professionally oriented learning activities outside of the programming provided by the university-designated lifelong learning provider. However, while the literature did indicate that expressed learners' needs are, for the most part, directed toward professionally oriented education and training, fully one-third of contemporary adult learners indicate a desire "to learn for learning's sake" (NCES, 2004).

These results of the IES at Southwestern University in the area of served populations and annual registrations are considered accurate within the degree of error resultant from the program coordinators' estimation of registrations and indicate a need

for further investigation into the significantly underperforming registration production (2%, of the designated lifelong learning unit). Follow-on strategic planning efforts utilizing population data developed through the IES procedure should focus on the development of a marketing sub-plan identifying learner populations that could particularly benefit from the institution's core philosophical and academic strengths and, in turn, accurately design, develop, and target programming to these specific populations.

Research Question 7 was designed as a data collection process to provide an estimate of the annual gross revenues produced by all lifelong learning activity providers at an institution. This particular IES research project was conceived and executed by the author's personal initiative and was dependent on the collegial cooperation of interviewed lifelong learning program coordinators. As such, the gross revenue figures presented are based on estimates provided by the interviewed coordinators. An institutionally directed IES procedure would likely, and preferably, accomplish this task through the submission of official revenue and expense reports rather than an interview process. An administratively directed environmental scan will likely have a more accurate accounting of expenses and net revenue and will reduce the actual IES production hours necessary to complete the scanning procedure.

Previously, it was mentioned that Southwestern University administrators wished to increase annual lifelong learning activity revenues by 400% to 500% based on Academic year 2006-07 program reporting. Based on the reported 2007-08 combined gross revenues of $1,151,0330.00 from the University's two recognized lifelong learning programming units, CCECM and "501(c)(3)," that desired revenue baseline has actually

been realized for quite some time. This application of prototype IES procedure revealed an estimated total of $4,713,042.00 in gross revenues produced by non-designated lifelong learning providers that were not reported as such in the institution's annual report on lifelong learning programming. This $4,713,042.00 very nearly matches the desired revenue expansion goal mentioned previously. The University's goal of a 400% to 500% program revenue increase was established without the documentation and thorough understanding of the existing, non-reporting lifelong learning production, and outcomes now provided by the IES process. Based on the findings of widespread and diverse lifelong learning revenue generation, perhaps the established goal should be reconsidered to a lower figure. The IES procedure revealed that many potential adult learners, who could benefit from the academic strengths of the University and, in turn, increase the gross revenue percentage, are in many instances already being served by non-designated lifelong learning units. Administrators and planners can use these IES process results to more accurately target potential learner populations and more coherently provide direction and expectations of program growth through an integrated strategic plan.

Research Question 8 was conceptualized to capture non-designated lifelong learning activity provider staffing and organizational data. This data is necessary to inform administrators and planners in developing a leaner, more streamlined lifelong learning programming organization. An organization that is more cost efficient and learner-centric through coordinated staff efforts, consolidated physical resources, and a single, standardized registration system. The IES process uncovered that eight of the 12 non-designated lifelong learning units identified open enrollment, non-degree credit

lifelong learning as their primary organizational mission. Eleven of these 12 units

identified at least one person who specifically had the task of maintaining a lifelong

learning program and/or activity as a primary, evaluated line item in their university

position description. All of these 12 programs required some sort of data system to

accept and track learning event registrations and provide learners a record of their

participation. In total, an annual staff full-time equivalency (FTE) of 49.75 for all non-

designated lifelong learning activity providers was documented through the IES

procedure. The IES telephone interview process revealed that most of these staff

members performed near identical tasks in the execution of their learning activity

coordination; curriculum development and maintenance, event scheduling, providing

new student recruiting and orientation, registration management, internal and external

customer service, and program data documentation and reporting. The IES telephone

interview process also revealed that each of the 12 programs maintained their own

unique registration processing system, each requiring the expenditure of both fiscal and

human resources.

Lastly, the telephone interview process confirmed the lack of communication and

coordination among all Southwestern University lifelong learning activity providers, both

designated and non-designated. Beyond the costs of maintaining a dozen unique,

independent lifelong learning providers, it is reasonable to assume that service to

customers suffers, both to internal and external stakeholders by such a disjointed

system. Nasseh (1999), Rowley, Lujan, & Dolence (1998), and Stufflebeam (2002)

have all documented the expectations of a learner-centric course selection, student

advising and registration process by post-modern adult learners. The existing lifelong

learning organizational system revealed through the application of this IES process does not support this desirable "one-stop" service approach.

Research Question 9 was conceived specifically to provide for a revision of the IES prototype more appropriate for routine use in the field of lifelong learning programming. Employing Bryson's (2004) environmental scanning concept and this study's IES data collection methodology to develop useable sets of lifelong learning programming data for university administrators and planners proved to be highly effective and reasonably efficient in its original procedural design.

The IES procedure as defined by this study accurately identified previously unrecognized providers of defined lifelong learning programming, their programs and program objectives, their served populations, annual registrations, revenue and the organizational structures, staffing and resources necessary to maintain the programs. Equally significant, this application of the defined lifelong learning programming IES procedure identified several desirable design enhancements for all future use of this strategic planning data collection methodology. Knowledge gained from the application of the IES prototype at Southwestern University made it possible to refine the individual process steps and develop a more efficient procedural plan for use in practical application at similar large, public universities. This revised IES procedural plan is detailed in Figure 6.

The application of the prototype IES procedure within the Southwestern University lifelong learning system produced three procedural changes considered desirable in a production version of the procedure.

1. Define Lifelong Learning	2. Develop Database Fields	3. Create Access Database
Institution defines its concept of lifelong learning programming and sets criteria for consideration as a lifelong learning provider.	Define an institutional typology for lifelong learning constructs and terminology. Establish database field names based on developed typology to be captured within the context of the institution's definition of a lifelong learning provider.	Design and establish a relational database table to receive consolidated data, the "Consolidated Lifelong Learning Programming Database" (CLLPD).

4. Identify Source Databases	5. Import Source Databases	6. Establish Bookmarking Protocol
Identify existing institutional source databases that contain lifelong learning programming fields. Match defined data fields to the CLLDP table and save as Excel™ spreadsheet file.	Import data from institutional source tables and incorporate into the CLLPD.	Establish standardized framework for titling and saving website bookmarks for follow-on analysis.

7. Conduct a Departmental Website Inventory	8. Input Web Scan Data	9. Filter Data
Conduct a scan of each of the institution's departmental websites employing an intuitive use of the website's menu system to identify examples of non-credit learning activities offered by the individual centers and departments.	Input found, non-credit learning program variables from the website review directly into the CLLPD. Search and input instances of course marketing and input variables for those events not identified in a database.	Design and implement query and filtering protocols to identify providers and programs of only those activities defined as lifelong learning programming as defined by the study.

10. Interview Call List	11. Telephone Interviews	12. Complete Population of Database
Using the results of the filtered CLLPD data table, create an interview call list for follow-on interviews with identified program coordinator (s).	Conduct individual interviews with non-credit learning activity coordinator (s) using standardized interview guide sheets to collect data field variables unattainable through existing institutional databases or website scanning.	Input data collected from the telephone interview process directly into the appropriate variable cells of the CLLPD. Design queries and produce reports as requested by strategic planning teams.

Figure 6. Validated IES procedure flow chart.

First, Process Step 2, "Create Time-Task Log," is considered applicable and necessary only to this prototype application, designing a method to record IES procedures with the expressed purpose of identifying modifications to the process and/or emergent procedures, evident only through the exercise of the procedure. This step would not normally be required when applying the IES in common usage. The elimination of this step will further improve the efficiency of the process in terms of person-hours necessary to complete the procedure. Total production time for this experimental application of the IES procedure required 52 hours from database table development to survey reports. Elimination of the experimental process Step 2 could save an additional two to three production hours overall.

In practice, "Develop Database Fields," originally Process Step 3, now becomes Process Step 2, and required a significant modification to that procedure. Before attempting to identify the data fields to be incorporated in the CLLPD, an institutional lifelong learning programming typology should be clearly defined and agreed upon by all stakeholders participating in the strategic planning process. As mentioned previously, Downing (2007) found that individual lifelong learning units appear to arrange their program inventory elements uniquely and usually within an institutionally perceived relationship of a given course of instruction to any or all of four typological factors: instructional delivery methodology; course topic; learner demographic; and provider and/or learner expected learning ends. Likewise, Long (1983) described program categorization within three program identification and organizational factors: function; topic; and institutional framework.

This experimental application of the IES procedure utilized "learner demographic" and "provider expected learning ends" to standardize program types within the CLLPD data fields. In so doing, the application of the IES procedure essentially provides a standardized institutional typology of its lifelong learning terms and functions. In subsequent applications of the IES procedure, practitioners may prefer to follow the typology described by Long (1983) or even establish their own institutional typology. However, regardless of typological construct, it is highly recommended that this step be completed before any attempt at data collection.

Secondly, a new Process Step 6, "Establish Bookmarking Protocol," is considered an important addition to the revised IES process. Automated bookmarking through the Internet browser application is dependent on the webpage designer's use of HTML meta-tagging. If the designer does not employ the meta-tagging option, the resulting bookmark title will default to the server URL, which often is not related to webpage content. Because this prototype application of the lifelong learning IES did not employ a bookmarking protocol, almost four production hours had to be dedicated to relocating desired pages through a new departmental search.

Thirdly, Process Step 7, "Conduct a Website Scan," is reconceptualized as "Conduct a Departmental Website Inventory." The ad hoc data validation process step, linear department website scanning using the university's directory page, proved to be both more accurate and more efficient. The departmental website scanning allows a single operation for the identification of online programming not reported in the R-25 or similar database, as well as additional, collectable information on organizational mission, staffing, program description, and program objective field variable data for

those events included in the R-25 or similar database. Estimated production timesavings utilizing this emergent modification could easily be between eight to ten production hours.

Conclusions

Southwestern University has acknowledged, maintained, and marketed a branded lifelong learning unit, operating under the "Free University" model for almost 40 years. Based on the information gained from the telephone interview process it has also been supporting an unrecognized, diverse, decentralized "lifelong learning system" across campus for over a decade. This "system" evolved reactively without a guiding lifelong learning program model. Neither is lifelong learning programming addressed in the University's current strategic plan, nor do the institution's mission, vision, or goals documents include statements regarding lifelong learning. While the served region's professional community certainly benefits from this expansive activity, some learning populations are not being adequately served, particularly those seeking personal enrichment or intellectual tools preparing them to deal with continual technological and cultural change. Furthermore, the existing systems' supporting organizations and infrastructures are not operating at the level of efficiency necessary to compete in the arena of market-driven lifelong learning programming. Southwestern University needs to build its lifelong learning programming around a definitive, more robust program model.

The lifelong learning literature presents and discusses a variety of models. There are models designed around the type of organization conducting the learning, models organized by the learning objectives of the programming, models structured

according to populations served, and the list goes on. These models are deliberately abstract in their composition to allow for widespread use by one-of-a-kind organizations operating in a unique institutional and/or community environment. Reasoned selection and effective application of a programming model requires the preliminary process of defining the institution's lifelong learning mission, its vision, and its goals for that programming. With these guiding documents, the institution can embark on a process of strategic planning to support that vision and those goals. With a vision, a set of goals and a plan, the most appropriate lifelong learning program model for a given institution will be easily recognized.

The results of the strategic planning process complement the abstract outlines of the lifelong learning program model with its products of definitive statements of mission, vision, and objectives. The initial strategic planning process of program assessment reveals the details of existing organizational structures and resources, internal and external relationships, and the complexities and nuances of its unique operational environment, which in turn, guides the development of the institution's mission, vision, and goals documents. The IES procedure provides a model for framing the uniqueness of the institution, its existing structures, and its products that should be considered throughout the development of the strategic plan.

Bryson (2004) conceptualizes the internal environmental planning process as a methodology to discover organizational strengths and weakness in the development of a comprehensive organizational strategic plan. His complementary, external environmental planning process is organized to help the institution identify opportunities and threats related to its mission and goals. Stufflebeam's (2000) model accomplishes

a similar objective within a single procedure he refers to as context evaluation. The prototype lifelong learning IES was designed to identify only the internal lifelong learning data variables related to programming.

The application of the prototype IES processes did, in fact, identify institutional strengths; the faculty expertise and academic leadership expected of a research university, the currency of the knowledge provided, and the ease of access to that new knowledge through the open enrollment of lifelong learners. Likewise, several weaknesses were uncovered through the IES procedure. Southwestern University's disjointed system of lifelong learning programming providers and inadequate inter-university communication within the field of lifelong learning programming is inefficient and noncompetitive. The IES revealed self-defeating competition, duplication of efforts, and a non student-centric infrastructure of program marketing, self-service course selection and provider-unique registration systems.

While the application of the prototype IES procedure cannot resolve these issues of communication and coordination, a proposed common lifelong learning programming vocabulary, developed through the process of IES Process Step 2, can be offered for consideration by Southwestern University administrators.

More importantly, it was highly effective in accurately identifying the breadth of Southwestern University's lifelong learning programming, the resources expended, and revenues reaped through the current system of programming and in providing planners a clean-slate start to the larger strategic planning process.

Considering the results of time-task procedure within the experimental application IES process, coupled with recommended modifications to the IES

Procedural Flow Chart, it is reasonable to assume that a common application of the IES

procedure can produce similarly comprehensive lifelong learning programming data

sets for other large public university lifelong learning systems. As little as 40 production

hours or less are needed to complete the IES when executed by an experienced lifelong

learning coordinator. Further, it could be assumed that in a routine application of the

IES procedures, the overall value provided by the resulting data to the strategic

planning effort through its thoroughness, accuracy, and efficiency would certainly justify

the resources necessary to accomplish the process. The final return on IES investment

should ultimately be calculated on its contribution to a proactive, strategically planned,

and accurately modeled, lifelong learning programming organization.

Recommendations for Further Research

This research study investigated the application of a single sub-procedure within

a larger lifelong learning strategic planning effort. An obvious follow-on research

opportunity would be the conceptualization and evaluation of a lifelong learning external

environmental scanning (EES) procedure.

Within Bryson's (2004) construct of environmental scanning, the internal

environmental scanning procedure is designed to capture organizational data that

informs planners about an institution's particular strengths and weaknesses. The EES

procedure is an equally critical and complementary set of processes to inform

administrators and planners of the external threats to the successful accomplishment of

the organization's mission and goals and assist in identifying potential opportunities that

play off the organization's strengths.

The application of an EES procedure will be an equally critical and necessary

data collection step in an overall strategic planning process at Southwestern University and any other institution applying the IES procedure. With a procedural objective of providing organized data to inform planners about possible external programming opportunities and potential obstacles to programming success, the two sub-processes, IES and EES, should be conducted concurrently, or sequentially, within a single strategic planning effort. At present, no lifelong learning EES modeling procedure has been described in the literature.

Likewise, a comparative, practical application of Stufflebeam's (2003) context evaluation process to lifelong learning strategic planning would certainly contribute to the knowledge bases of both non-degree credit lifelong learning programming and institutional strategic planning. These two scanning methodologies have similar strategic objectives; however, the application approach and resources necessary to conduct the procedure would differ significantly. Further research into both of these scanning processes would likely be of value to investigators working in the broader area of non-profit strategic planning, particularly in the application of environmental scanning protocols within institutional units other than lifelong learning where external threats and opportunities are not directly related to the generation of revenue in a competitive market.

A third recommendation for further research would be a case study of the incorporation of lifelong learning programming as a defined university mission through the application of a non-profit institution strategic planning model from beginning to end. A natural follow-on research opportunity could be a qualitative case study on the application or development of a guiding lifelong learning programming model based on

the results of the strategic planning process.

Lastly, were all of these research recommendations accepted and conducted by a single institution, a longitudinal case study of the strategic processes and inter-organizational interactions could be used to develop a process model for lifelong learning programming transition from unit marginalization and inefficiency to mission inclusion and lifelong learning programming leadership.

A recommendation for further research not directly related to environmental scanning or the processes of strategic planning, yet informed through this study, would be in the area of broad, community oriented, non-degree credit educational programming for adults, the traditional role filled by "Free University" modeled program. While the IES procedure documented the massive skew toward professional and career training in the last decades, there is nonetheless a significant population of adult learners interested in personal enrichment learning, "learning for the sake of learning" (NCES 2000, 2004). Twentieth-century change is both technical and cultural, and it is through the personal enrichment program package that learners gain access to the historical, philosophical, and psychological knowledge bases. Additional research is necessary to discover why this particular package is in decline when a third of ever-increasing populations of adult learners claim this niche is a vital part of their learning lives.

Perhaps an investigation into the possibilities of developing a model of an institutional "Lifelong Learning Gateway" organization, a single university lifelong learning administrative support unit. This administrative unit would be charged with maintaining database and registration infrastructure, recordkeeping and reporting,

research, marketing, and student services for the total university lifelong learning effort, leaving the actual programming and instruction to be carried out by the respective university centers and departments that are creating the knowledge sought by the new breed of lifelong learners. Such a "Gateway" system would allow for a more efficient use of resources and take advantage of the university's inherent strength of expert faculty research and teaching. A standardized, institutionalized programming typology facilitating communication between the institution's provider units would evolve as the teaching units interact with the centralized lifelong learning gateway unit. The provider units will benefit from a dedicated, consistent, and professional student services corps, single-source lifelong learning program record maintenance and reporting. Such an organizational structure will facilitate continuous environmental scanning and reasoned vision adjustment. Having the lifelong learning programming and activities conceived, produced, and presented by the expert faculty and researchers within the university would capitalize on the institution's recognized strengths in knowledge creation and authoritative information dissemination.

Recommendations for Practice

This study examined the effectiveness of the EIS procedure in identifying previously unrecognized lifelong learning programming and, the associated organizational support structures and operational procedures of that programming. The IES procedure proved to be not only a valuable data collection and assessment tool for the strategic planning process but also demonstrated its potential in contributing accurate data to the university's data collection processes in direct support of its accreditation requirements. In the application to lifelong learning programming IES

documented that the vast majority of lifelong learning programming, student participation, and generated revenues, have consistently been underreported to its regional accrediting authority. Expanding application of the IES procedure across other university program areas could likely improve accuracy, and enhance the efficiency of data collection efforts in the routine institutional and academic program accreditation processes. Moreover, the IES procedure demonstrated its effectiveness in identifying organizational strengths and weakness, invaluable information for university administrators developing informational presentations and/or suggested QEP packages to accreditation teams.

Two initial premises for this research were that technological and cultural change is unrelenting and moves at an ever increase rate and that many large public universities had not planned for, or established operating lifelong learning programming models appropriate to the times.

A last recommendation for implementers of the IES procedures willing to make a commitment to continuous program improvement would be expectation of periodic follow-on applications of the IES procedure. While this study did not specifically attempt to determine a proscribed periodicity for applying the process, a five-year cycle linked to the institution's strategic plan review schedule or possibly to the university's accreditation review cycle would appear to be a reasonable starting point for establishing an IES review plan.

Bagnall (2001, p. 42) noted, "Contemporary society is necessarily a learning society. Only successful individuals, organizations and nations figure, or count in such a culture, and to be successful requires a commitment to lifelong learning." This

declaration of "commitment" to lifelong learning is certainly applicable to the providers of those lifelong learning opportunities. If a university-sponsored lifelong learning system is to "count" itself relevant in an era of mass-marketed, learner-centric programming, then a "commitment" to research, learning, and informed strategic planning is not only logical, but essential.

APPENDIX A

EXAMPLE OF LIFELONG LEARNING ACCESS DATABASE

FIELD ID AND INPUT

Field ID	Sample Input
Database ID	1
Unit	CEC
Event	GRE Prep
Category	Test Prep
Population	Adult Open
Defined	Yes
Fee	Yes
Fee Amount	$599.00
Revenue	$3,999.00
Coordinator	Downing
MissionUnit	Lifelong learning
MissionLL	
Objective	Exam Improvement
TargetPoP	College Adults
REG	30
Structures	Registration, Marketing, staffing
PersNum	2
PersHrs	60
PersUPO	Yes

APPENDIX B

LIFELONG LEARNING PROGRAM INTERVIEW FORM

Unit Name_____

Primary Unit Mission_____

Lifelong Learning a Defined Mission?   Yes___   No___

Learning Objectives of Lifelong Learning Activity?_____

_____
_____
_____
_____

Targeted
Population_____

 Course Fee $_____

 # Sections Offered/Year _____

 # Course Registrations per Section per Year _____

What, if any, Lifelong Learning Organizational Structures are Established within the
Unit?_____

_____
_____
_____
_____

How Many Staff Required for Each Event Section? _____

Is Event Support Assignment Documented in UPO-35 Yes___   No___

Total Hours Dedicated to Produce Each Event Section _____

APPENDIX C

LISTING OF SURVEYED NON-DEGREE CREDIT EVENTS

Unit	Event	Delivery
AMERICA READS	FICTION READING	Meeting
APPLIED GERONTOLOGY	40TH ANNIVERSARY CELEBRATION,	Meeting
BEHV	BMAPS PARENT TRAINING COURSE, Rsrv_75835	Live SC
BEHV	DR. SIDMAN, INVITED GUEST SPEAKER,	Lecture
BEHV	GUEST SPEAKER STEVE WHITE, Rsrv_60682	HE Student
BEHV	GUEST SPEAKER, AMY CRYE, Rsrv_76025	Lecture
BEHV	GUEST SPEAKER	Lecture
BEHV	Basic Behavior Principles	Online SC
BEHV	Techniques in Applied Behavior Analysis	Online SC
BEHV	Research and Applications in Behavior Analysis	Online SC
BEHV	Professional/Ethical Issues	Online SC
BEHV	Functional Analysis in School Settings	Online SC
BEHV	Introduction to Verbal Behavior	Online SC
BEHV	Current Issues in the Behavioral Treatment of Autism	Online SC
BEHV	Ensuring a Brighter Future for Troubled Children/Youth:	Conference
Center for Music Educators	Introduction to Orff Schulwerk	Workshop
Center for Music Educators	Kodály Certification Training:	Live SC
Center for Music Educators	Instrument Repair for the Busy Band Director	Live SC
Center for Music Educators	Orff Schulwerk, Level I*	Live SC
Distance Learning Support Center	Sloan-C College Pass	Online SC
Business Education Center	Logistics Management	Seminar
Business Education Center	Supply Chain Finance	Seminar
Business Education Center	Transportation Management	Seminar
Business Education Center	Supply Chain Analytics	Seminar

Unit	Event	Delivery
Business Education Center	Logistics and Supply Chain Management	Seminar
Business Education Center	Using Logistics to Drive Bottom Line Performance	Seminar
Parent Education Center	Developmental Stages of Parenting and Family Life	Online SC
Parent Education Center	"Who is My Child? Understanding Children's Temperament"	Seminar
Parent Education Center	5-6-7-8 Let's Learn How to Communicate"	Seminar
Parent Education Center	AAHHH…and other ways to de-stress!"	Seminar
Center for the Advancement of Public Administration	Public Funds Investment Act	Workshop
Center for the Advancement of Public Administration	Computer Vulnerability & Security Awareness	Workshop
Center for the Advancement of Public Administration	New Investment Officer training	Workshop
Program in Gerontology	Certified Aging Services Professional	Live SC
Program in Gerontology	Certified Aging Services Professional	Distance Learning
COE	AUTISM INTERVENTION PROGRAM, Rsrv_49355	Workshop
COMMUNICATION STUDIES	GUEST SPEAKER FOR ALUMNI DAY, Rsrv_76158	Lecture
Animals in Therapy Center	ANIMAL ASSISTED THERAPY WORKSHOP INTRODUCTORY AND ADVANCED TRAINING	Workshop
Animals in Therapy Center	ANIMAL ASSISTED THERAPY WORKSHOP	Distance Learning
Animals in Therapy Center	Pet Partners Animal Team Evaluation	Cert_Exam
Distance Learning Support Center	Volunteer Management Group	Online SC
Distance Learning Support Center	Certified Public Library Administrator	Online SC
Distance Learning Support Center	Library Courses	Online SC
Distance Learning Support Center	Rehabilitation	Online SC
Distance Learning Support Center	School Librarians	Online SC
Center for Special Needs Children	Child Centered Play Therapy	Online SC
Center for Special Needs Children	Play Therapy: The art of Relationships	Online SC

Center for Special Needs Children	Intensive Supervision Workshop	Workshop

Unit	Event	Delivery
Dept of ATTD	Health Science Technology Education	Live SC
Dept of Philosophy	A Christian Ethics of Consumption	Lecture
Dept of Philosophy	Environmental Ethics Across Worldviews	Lecture
Dept of Philosophy	New Watersheds of Religion and Nature	Lecture
Dept of Philosophy	Natura Naturans for the 21st Century?	Lecture
Dept of Philosophy	Nature, Religion, and Modernization in Theoretical Perspective	Lecture
Dept of Philosophy	Thoughts About the Future of U.S. Science	Lecture
Dept of Philosophy	Digital Development and the Technological Configuration of Culture	Lecture
Dept of Philosophy	The Moral Dimension of Japanese Garden Aesthetics	Lecture
Dept of Philosophy	Why a UNT-Philosopher-Judge Supports Philosophy Students	Lecture
Dept of Philosophy	Technology and Religion: From Christianity and Buddhism	Lecture
Dept of Philosophy	A New Problem with Plato's City Soul Analogy	Lecture
Dept of Philosophy	Self Limitation in Science and Philosophy	Lecture
Dept of Philosophy	Digital Development and the Technological Configuration of Culture	Lecture
ECON	MIDDLE SCHOOL ECONOMIC EDUCATION CONF., Rsrv_76410	Conference
Elm Fork	GUEST LECTURER, Rsrv_72499	Lecture
ENGL	IAN FINSETH TALK, Rsrv_76573	Lecture
ENGL	VISITING POET LECTURE, Rsrv_73112	Lecture
EQUITY & DIVERSITY	WORLD AIDS DAY PROGRAM, Rsrv_64580	Seminar
MKTG	DISTINGUISHED LECTURE SERIES, Rsrv_73657	Lecture
MUSC	Conductors Collegiums	Workshop
MUSC	Becoming the Choral Poet VII	Workshop
MUSC	Directors Workshop	Workshop
Music	Music Education Lecture Series	Lecture
Program in Social Support Services	Diversity & Rehabilitation Service Delivery	Webinar
Program in Social Support Services	Workforce Re-entry & the Ex-offender	Seminar

Unit	Event	Delivery
Program in Social Support Services	Job Coaching	Seminar
Program in Social Support Services	Mental Health & Substance Abuse	Seminar
Program in Social Support	Certificate in Employment Services	Live SC

Unit	Event	Delivery
Program in Social Support Services	Resiliency	Webinar
Program in Social Support Services	Certificate in Employment Services	Live SC
Program in Social Support Services	Employment of People with a Disability & a Criminal Background,	Live SC
Program in Social Support Services	Conflict Resolution for Vocational Rehabilitation Professionals,	Webinar
Program in Social Support Services	Supported Employment Basic Skills Clinic,	Workshop
Program in Social Support Services	Building Employer Relationships: Marketing & Job Development	Workshop
Program in Social Support Services	Social Security Disability Benefits & Impact of Work	Webinar
Program in Social Support Services	Certificate in Employment Services	Live SC
Program in Social Support Services	Supported Employment Basic Skills Clinic	Workshop
Program in Social Support Services	Autism - 3 Part Series,	Webinar
Program in Social Support Services	Job Coaching	Seminar
Program in Social Support Services	Customized Job Development	Webinar
Program in Social Support Services	Supported Employment: Basic Skills Clinic	Workshop
Program in Social Support Services	Managing the Unknowable: A Step-by-Step Approach to Writing Great Business Plans	Webinar
"501(c)(3)"	Natural Gas	Live SC
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Seminar

Unit	Event	Delivery
"501(c)(3)"	Introduction to Oil & Gas Taxation	Live SC
"501(c)(3)"	Natural Gas from Prospect to Burner Tip	Live SC
"501(c)(3)"	Joint Interest Accounting	Live SC
"501(c)(3)"	Intro to Midstream	Live SC
"501(c)(3)"	Natural Gas from Prospect to Burner Tip	Live SC
"501(c)(3)"	Oil and Gas Taxation	Live SC
"501(c)(3)"	Joint Interest Accounting & Billing	Live SC
Unit	**Event**	**Delivery**
"501(c)(3)"	National Oil and Gas Revenue Accounting School	Live SC
"501(c)(3)"	Intro Business of Upstream Oil and Gas	Live SC
"501(c)(3)"	Sarbanes-Oxley	Workshop
"501(c)(3)"	Petroleum Accounting Issues	Workshop
"501(c)(3)"	CFP Dallas Fall 2006, Session I	Live SC
"501(c)(3)"	CFP Connecticut Fall 2006, Session I	Live SC
"501(c)(3)"	CFP Dallas Spring 2006, Session II	Live SC
"501(c)(3)"	Connecticut CFP Spring 2006, Session II	Live SC
"501(c)(3)"	CFP Dallas Fall 2006, Session II	Live SC
"501(c)(3)"	CFP Connecticut Fall 2006, Session II	Live SC
"501(c)(3)"	CFP Dallas Spring 2007, Session I	Live SC
"501(c)(3)"	CFP Connecticut Spring 2007, Session I	Live SC
"501(c)(3)"	2006 North American Petroleum Acct. Conference	Conf
"501(c)(3)"	Dallas Summer 2007 Paralegal Certificate Program	Live SC
"501(c)(3)"	Summer 2007 On-line Paralegal Certificate Program	Online SC
"501(c)(3)"	Dallas Fall 2007 CFP, Session I	Live SC
"501(c)(3)"	Dallas Spring 2007 CFP, Session II	Live SC
"501(c)(3)"	Connecticut Spring 2007 CFP, Session II	Live SC
"501(c)(3)"	Fall 2006 On-line Paralegal Certificate Program	Online SC
"501(c)(3)"	Fall 2006 Dallas Paralegal Certificate Program	Live SC
"501(c)(3)"	Spring 2007 Dallas Paralegal Certificate Program	Live SC

Unit	Event	Delivery
"501(c)(3)"	Spring 2007 On-line Paralegal Certificate Program	Online SC
"501(c)(3)"	National Accounting and Auditing	Live SC
"501(c)(3)"	Joint Interest Agreements and Accounting Issues	Live SC
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Live SC
"501(c)(3)"	Natural Gas from Prospect to Burner Tip	Live SC
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Live SC
"501(c)(3)"	Introduction to Midstream	Live SC
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Live SC
Unit	**Event**	**Delivery**
"501(c)(3)"	Denver Oil and Gas Tax Institute	Live SC
"501(c)(3)"	Natural Gas/Production	Live SC
"501(c)(3)"	1st quarter Petroleum Accounting I	Live SC
"501(c)(3)"	2nd quarter Petroleum Accounting I	Live SC
"501(c)(3)"	PHR/SPHR Review class	Live SC
"501(c)(3)"	SHRM Learning System	Live SC
"501(c)(3)"	Petroleum Accounting I Online	Online SC
"501(c)(3)"	2006 National Oil & Gas Royalty Conference	Conf
Technology Applications In Teaching	PRESENTATION, Rsrv_74628	Seminar
Women's Studies	FemFlicks	Lecture
Women's Studies	Blue Stockings Book Club	Workshop
Dept of History	Economic Transformations in History	Conference

APPENDIX D

CLLPD PRIMARY FILTERING FIELD VARIABLES

Unit	Enrollment Type[*]	Fee[*]	Structures	UPO-35[*]
Source File Merge	Academic Pro - Restricted	Yes	Intuitive From Web/Interview	Yes
	Adult Open Enrollment	No		No
	Court Referral			
	Employee -Restricted			
	HE Student - Restricted			
	Unknown			
	Youth Open – Fee			
	Youth Open – No Fee			
	Youth - Restricted			

[*]Fix Field Variable Item from Drop-List

APPENDIX E

DEFINED LIFELONG LEARNING PROVIDER COURSE FEE

Unit	Event	Delivery	Fee
Distance Learning Support Center	Volunteer Management Group	Online SC	$20.00
Center for Special Needs Children	Child Centered Play Therapy	Online SC	$29.00
MUSC	Directors Workshop	Workshop	$30.00
Animals in Therapy Center	Pet Partners Animal Team Evaluation	Cert_Exam	$35.00
Advancement of Public Administration	Computer Vulnerability & Security Awareness	Workshop	$50.00
Distance Learning Support Center	Library Courses	Online SC	$60.00
Distance Learning Support Center	Rehabilitation	Online SC	$60.00
Distance Learning Support Center	School Librarians	Online SC	$60.00
Center for Special Needs Children	Summer Institute	Workshop	$130.00
Center for Special Needs Children	Play Therapy: The art of Relationships	Online SC	$149.00
Animals in Therapy Center	ANIMAL ASSISTED THERAPY WORKSHOP	Workshop	
Animals in Therapy Center	INTRODUCTORY AND ADVANCED TRAINING	Workshop	$200.00
Program in Social Support Services	Diversity & Rehabilitation Service Delivery	Webinar	$211.12
Program in Social Support Services	Workforce Re-entry & the Ex-offender	Seminar	$211.12
Program in Social Support Services	Job Coaching	Seminar	$211.12
Program in Social Support Services	Mental Health & Substance Abuse	Seminar	$211.12
Program in Social Support Services	Certificate in Employment Services	Live SC	$211.12
Program in Social Support Services	Supported Employment: Basic Skills Clinic	Live SC	$211.12
Program in Social Support Services	Social Security Disability Benefits & Impact of Work	Webinar	$211.12
Program in Social Support Services	Supported Employment: Basic Skills Clinic,	Live SC	$211.12
Program in Social Support Services	Job Coaching	Seminar	$211.12
Program in Social Support Services	Supported Employment: Basic Skills Clinic	Seminar	$211.12

Program in Social Support Services	Vocational Strategies for Specific Disabilities: Mental Health & Substance Abuse	Live SC	$211.12
Program in Social Support Services	Managing the Unknowable: A Step-by-Step Approach to Writing Great Business Plans	Webinar	$211.12
Program in Social Support Services	Disability Etiquette	Webinar	$211.12
Program in Social Support Services	Job Coaching	Seminar	$211.12
Program in Social Support Services	Customized Job Development	Webinar	$211.12
Program in Social Support Services	Building Employer Relationships: Marketing,	Workshop	$211.12
Program in Social Support Services	Building Employer Relationships: Marketing,	Workshop	$211.13
Program in Social Support Services	Certificate in Employment Services	Live SC	$211.13
Program in Social Support Services	Resiliency	Webinar	$211.13
Program in Social Support Services	Certificate in Employment Services	Live SC	$211.13
Program in Social Support Services	Employment of People with a Disability & a Criminal Background,	Live SC	$211.13
Program in Social Support Services	Conflict Resolution for Vocational Rehabilitation Professionals,	Webinar	$211.13
Program in Social Support Services	Supported Employment Basic Skills Clinic,	Workshop	$211.13
Program in Social Support Services	Building Employer Relationships: Marketing & Job Development	Workshop	$211.13
Program in Social Support Services	Social Security Disability Benefits & Impact of Work	Webinar	$211.13
Program in Social Support Services	Certificate in Employment Services	Live SC	$211.13
Program in Social Support Services	Supported Employment Basic Skills Clinic	Workshop	$211.13
Program in Social Support Services	Autism - 3 Part Series,	Webinar	$211.13
Program in Social Support Services	Job Coaching	Seminar	$211.13
Program in Social Support Services	Customized Job Development	Webinar	$211.13
Program in Social Support Services	Supported Employment: Basic Skills Clinic	Workshop	$211.13
Program in Social Support Services	Managing the Unknowable: A Step-by-Step Approach to Writing Great Business Plans	Webinar	$211.13
Advancement of Public Administration	Public Funds Investment Act	Workshop	$240.00
Advancement of Public Administration	New Investment Officer training	Workshop	$240.00

Animals in Therapy Center	ANIMAL ASSISTED THERAPY WORKSHOP	Distance Learning	$250.00
Distance Learning Support Center	Certified Public Library Administrator	Online SC	$300.00
Center for Music Educators	Introduction to Orff Schulwerk	Workshop	$300.00
Center for Music Educators	Instrument Repair for the Busy Band Director	Live SC	$300.00
Center for Music Educators	Kodály Certification Training:	Live SC	$600.00
Center for Music Educators	Orff Schulwerk, Level I*	Live SC	$600.00
MUSC	Conductors Collegiums	Workshop	$600.00
MUSC	Conductors Collegiums	Workshop	$600.00
"501(c)(3)"	Intro to Midstream	Live SC	$350.00
"501(c)(3)"	Natural Gas from Prospect to Burner Tip	Live SC	$350.00
"501(c)(3)"	Oil and Gas Taxation	Live SC	$350.00
"501(c)(3)"	Joint Interest Accounting & Billing	Live SC	$350.00
"501(c)(3)"	Intro Business of Upstream Oil and Gas	Live SC	$350.00
"501(c)(3)"	Sarbanes-Oxley	Workshop	$350.00
"501(c)(3)"	Petroleum Accounting Issues	Workshop	$350.00
"501(c)(3)"	Joint Interest Agreements and Accounting Issues	Live SC	$350.00
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Live SC	$350.00
"501(c)(3)"	Natural Gas from Prospect to Burner Tip	Live SC	$350.00
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Live SC	$350.00
"501(c)(3)"	Introduction to Midstream	Live SC	$350.00
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Live SC	$350.00
"501(c)(3)"	Natural Gas/Production	Live SC	$350.00
"501(c)(3)"	2006 North American Petroleum Acct. Conference	Conf	$425.00
"501(c)(3)"	2006 National Oil & Gas Royalty Conference	Conf	$500.00
"501(c)(3)"	Houston Oil and Gas Tax Institute	Live SC	$600.00
"501(c)(3)"	Denver Oil and Gas Tax Institute	Live SC	$600.00
Business Education Center	Logistics Management	Seminar	$695.00
Business Education Center	Transportation Management	Seminar	$695.00

Business Education Center	Using Logistics to Drive Bottom Line Performance	Seminar	$695.00
Center for Special Needs Children	Intensive Supervision Workshop	Workshop	$780.00
Dept of ATTD	Health Science Technology Education	Live SC	$825.00
Business Education Center	Supply Chain Analytics	Seminar	$895.00
Business Education Center	Logistics and Supply Chain Management	Seminar	$895.00
"501(c)(3)"	PHR/SPHR Review class	Live SC	$1,150.00
"501(c)(3)"	SHRM Learning System	Live SC	$1,150.00
Business Education Center	Supply Chain Finance	Seminar	$1,195.00
Program in Gerontology	Certified Aging Services Professional	Live SC	$1,395.00
"501(c)(3)"	National Oil and Gas Accounting School	Live SC	$1,625.00
"501(c)(3)"	National Oil and Gas Revenue Accounting School	Live SC	$1,625.00
"501(c)(3)"	National Accounting and Auditing	Live SC	$1,625.00
Program in Gerontology	Certified Aging Services Professional	Distance Learning	$1,650.00
"501(c)(3)"	Dallas Summer 2007 Paralegal Certificate Program	Live SC	$1,895.00
"501(c)(3)"	Summer 2007 On-line Paralegal Certificate Program	Online SC	$1,895.00
"501(c)(3)"	Fall 2006 On-line Paralegal Certificate Program	Online SC	$1,895.00
"501(c)(3)"	Fall 2006 Dallas Paralegal Certificate Program	Live SC	$1,895.00
"501(c)(3)"	Spring 2007 Dallas Paralegal Certificate Program	Live SC	$1,895.00
"501(c)(3)"	Spring 2007 On-line Paralegal Certificate Program	Online SC	$1,895.00
"501(c)(3)"	CFP Dallas Fall 2006, Session I	Live SC	$2,200.00
"501(c)(3)"	CFP Connecticut Fall 2006, Session I	Live SC	$2,200.00
"501(c)(3)"	CFP Dallas Spring 2006, Session II	Live SC	$2,200.00
"501(c)(3)"	Connecticut CFP Spring 2006, Session II	Live SC	$2,200.00
"501(c)(3)"	CFP Dallas Fall 2006, Session II	Live SC	$2,200.00
"501(c)(3)"	CFP Connecticut Fall 2006, Session II	Live SC	$2,200.00
"501(c)(3)"	CFP Dallas Spring 2007, Session I	Live SC	$2,200.00
"501(c)(3)"	CFP Connecticut Spring 2007, Session I	Live SC	$2,200.00
"501(c)(3)"	Dallas Fall 2007 CFP, Session I	Live SC	$2,200.00

"501(c)(3)"	Dallas Spring 2007 CFP, Session II	Live SC	$2,200.00
"501(c)(3)"	Petroleum Accounting I Online	Online SC	$100.00
"501(c)(3)"	1st quarter Petroleum Accounting I	Live SC	$100.00
"501(c)(3)"	Natural Gas	Live SC	$350.00
"501(c)(3)"	Land and the Law in Upstream Oil & Gas	Seminar	$350.00
"501(c)(3)"	Introduction to Oil & Gas Taxation	Live SC	$350.00
"501(c)(3)"	Natural Gas from Prospect to Burner Tip	Live SC	$350.00
"501(c)(3)"	Joint Interest Accounting	Live SC	$350.00

APPENDIX F

TIME–TASK LOG

Event	Start Time	End Time	Time	Primary Procedure	Sub-step Procedure
1	11:00:00 AM	11:10:00 AM	:10	Development of Time-Task Log	Create Excel Spreadsheet
2	11:11:00 AM	11:46:00 AM	:36	Data Design & Development	Create Access database Template
3	11:46:00 AM	12:20:00 PM	:34	Data Design & Development	Access Input Form Building
4	9:59:00 AM	11:27:00 AM	1:26	Data Design & Development	R-25 Query Building
5	10:15:00 AM	10:35:00 AM	:20	Data Design & Development	Create Telephone Call List
				*Emergent Sub Process***	Create Bookmarking System to Easily Retrieve URL
			:05	Data Design & Development	Locate Interviewee's website and bookmark in new bookmark file
				Time - **3:11**	
6	3:20:00 PM	5:10:00 PM	1:50	Data Capture & Consolidation	Web Survey - Keyword Search
7	11:59:00 AM	12:48:00 PM	:49	Data Capture & Consolidation	Web Survey - Keyword Search
8	11:37:00 AM	12:55:00 PM	1:18	Data Capture & Consolidation	Web Survey - Keyword Search
9	10:20:00 PM	2:45:00 PM	4:25	Data Capture & Consolidation	Web Survey - Keyword Search
				** *Emergent Sub Process*	Survey Each Department Website Listed in University Directory
10	9:30:00 AM	10:28:00 AM	:58	Data Capture & Consolidation	Web Survey - Department Search
11	11:15:00 AM	1:35:00 PM	2:20	Data Capture & Consolidation	Web Survey - Department Search
12	10:40:00	3:45:00 PM	5:05	Data Capture & Consolidation	Web Survey - Department Search

	AM				
13	3:44:00 PM	5:15:00 PM	1:41	Data Capture & Consolidation	Web Survey - Department Search
14	11:10:00 AM	1:08:00 PM	1:58	Data Capture & Consolidation	Search for duplicate entries, confirm entries and delete
15	10:15:00 AM	12:25:00 PM	2:10	Data Capture & Consolidation	Search for duplicate entries, confirm entries and delete
				*** Emergent Sub Process*	Use Direct Site Search to Gather Data to Populate Blank R-25 Fields
16	1:45:00 PM	4:00PM	2:15	Data capture & Consolidation	Populate blank field variables on on-campus events from R-25
17	2:30:00 PM	6:48:00 PM	4:18	Data capture & Consolidation	Populate blank field variables on on-campus events from R-25
18	12:00:00 AM	11:05:00 AM	:50	Data capture & Consolidation	Populate blank field variables on on-campus events from R-25
19	3:25:00 PM	4:53:00 PM	1:28	Data capture & Consolidation	Merge "501(c)(3)" Web course descriptions to titles in CLLPD
20	10:53:00 AM	3:10:00 PM	4:13	Data capture & Consolidation	Merge "501(c)(3)" Web course descriptions to titles in CLLPD
21	4:00:00 PM	5:50:00 PM	1:50	Data capture & Consolidation	Populate blank field variables in CLLPD based on information gained from Telephone Interview
22	9:30:00 AM	9:50:00 AM	:20	Data capture & Consolidation	Populate blank field variables in CLLPD based on information gained from Telephone Interview
		Time - 37:31			
23	11:47:00 AM	12:11:00 PM	:24	Survey Data Integration	Export CEC Peopleware data to Excel spreadsheets
24	12:30:00 PM	12:38:00 PM	:08	Survey Data Integration	Export CEC Ed2Go data to Excel spreadsheets
25	12:38:00 PM	12:45:00 PM	:07	Survey Data Integration	Export "501(c)(3)" Peopleware data to Excel spreadsheets

26	12:12:00 PM	1:40:00 PM	1:38	Survey Data Integration	Merge Three Spreadsheets into single Excel spreadsheet
				*** Emergent Sub Process**	R-25 System Interface Change - No Access Option
27	10:21:00 AM	11:47:00 AM	1:57	Survey Data Integration	Export of R-25 Data to Excel
28	1:00:00 PM	1:10:00 PM	:10	Survey Data Integration	Import R-25 Excel data to CLLPD Template
29	1:10:00 PM	1:15:00 PM	:05	Survey Data Integration	Import Consolidated CEC & "501(c)(3)" Excel data into CLLPD
30	2:32:00 PM	4:40:00 PM	2:08	Survey Data Integration	Match Organizational data on CLLPD file
				*** Emergent Sub Process**	Change CLLPD Data Field Title; Modification Variable List
31	4:40:00 PM	5:07:00 PM	:27		

Time - 4:47

32			:10	Phone Interview Surveys	Telephone Interviews - Aging Professional - Debbie Gailes
33			:01	Phone Interview Surveys	Telephone Interviews - HSTE - Rebecca How - NO RESPONSE
34			:01	Phone Interview Surveys	Telephone Interviews - HSTE - Rebecca How - NO RESPONSE
35			:01	Phone Interview Surveys	Telephone Interviews - HSTE - Rebecca How - NO RESPONSE
36			:13	Phone Interview Surveys	Telephone Interviews - Rehab, SW, Addict - Martha Garber
37			:10	Phone Interview Surveys	Telephone Interviews - Studies in Music Ed - Julie Scott
38			:15	Phone Interview Surveys	Telephone Interviews - Logistics Ed - Shirley White
39			:01	Phone Interview Surveys	Telephone Interviews - Animal Therapy - Cnthia Chandler - NO RESPONSE
40			:01	Phone Interview Surveys	Telephone Interviews - Animal Therapy - Cnthia Chandler - NO RESPONSE
41			:01	Phone Interview Surveys	Telephone Interviews - Animal Therapy - Cnthia Chandler - NO RESPONSE
42			:03	Phone Interview Surveys	Telephone Interviews - BMAPS -Richard Smith - NOT DEFINED
43			:11	Phone Interview Surveys	Telephone Interviews - Play Therapy - Rinda Thomas
44			:06	Phone Interview Surveys	Telephone Interviews - Coll of Music - Jerry McCoy
45			:02	Phone Interview Surveys	Telephone Interviews - Sloan C - Amber Bryant - NOT

						DEFINED
46				:09	Phone Interview Surveys	Telephone Interviews - Ctr Public Mgt - Patrick Shinkle
47				:07	Phone Interview Surveys	Telephone Interviews - BEHV Analysis - Laura Anne Davis

Time - 1:51

					*** Emergent Sub Process*	<u>Direct Web Site Search to Determine Status from R-25 Source Data</u>
48	Concurrent	event #10			Programming Provider Determinations	Validating Entries
49	Concurrent	event #11			Programming Provider Determinations	Validating Entries
50	Concurrent	event #12			Programming Provider Determinations	Validating Entries
51	Concurrent	event #13			Programming Provider Determinations	Validate Entries and Identify missing data
52	Concurrent	event #15			Programming Provider Determinations	Delete Provider Candidates based on information gained from Interviews
53	10:10:00 AM	1:40:00 PM	3:30		Final Database Sorts and Reports	Organize Data for Chart & Graphic Development
54	3:40:00 PM	5:15:00 PM	1:55		Final Database Sorts and Reports	Organize Data for Chart & Graphic Development

Time - 4:35   **Total Time - 51:55**

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