BEYOND BARRIERS:

MAXIMIZING ACCESS TO LEARNING FOR MARGINALIZED ADULTS IN THE CITY OF EDMONTON

Research Report
October 23, 2009

Submitted to:
Edmonton Community Adult Learning Association (ECALA)
and NorQuest College

Submitted by:
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EXECUTIVE SUMMARY

Introduction

This project was conducted by a research team from Educational Policy Studies at the University of Alberta under contract to Edmonton Community Adult Learning Association (ECALA) and NorQuest College. The purpose of this project was to conduct an assessment of the educational programming needs of low-income adult populations, looking particularly at the educational gaps, trends and barriers for accessing learning within the City of Edmonton, as well as best practices for working with low-income learners. Findings will be used to inform the project partners' educational planning.

Methods

In order to reach people who are not often reached in research studies, we mobilized the research team's extensive network of contacts in community-based, grassroots agencies and organizations. From a list of 132 agencies, we contacted 112. In the end, 32 agencies were involved in one or more aspects of the study (i.e., 28% of those contacted).

Thirty-nine (39) people representing 28 agencies attended one of six focus groups to discuss a series of open-ended questions related to challenges and learning opportunities for marginalized adults.

We interviewed 39 marginalized adults using an open-ended interview guide with three main topic areas – learning experiences, barriers to learning and learning goals/needs. We met or exceeded our target for reaching identified marginalized groups, i.e., 62% women, 51% Aboriginal and 28% first language other than English or an Aboriginal language.

We administered 105, 15-minute written surveys in six locations where marginalized groups were meeting over the summer. Again, 50% of participants were Aboriginal but only half (47%) were women and only 11% reported a first language that was neither English or an Aboriginal language.

The main strength was our extensive reach into inner city and urban Aboriginal communities and the biggest challenges were related to the summer timing of the project and the tight timeframe of four months for such a comprehensive study.

Findings

From the Literature Reviews

The team conducted a series of literature reviews that included academic literature, policy documents, government statistics, research reports from local and national organizations and international reports about global trends and comparative evaluations of Canadian adult

education, mostly from within the past five years. The following are highlights from these reviews.

Context of Adult Education

The adult education landscape shows a shrinking of access to learning for adults who experience barriers and a simultaneous expansion of learning opportunities for the middle class with personal and workplace resources, and an increasing focus on programs that are employment-related for a globally competitive market economy. Some believe that adult education has abandoned some of its traditional educational goals such as social cohesion and equality. Together, both the OECD and Canadian scholars agree that the turn away from a broad base of adult education opportunities that address life-wide and life-long issues beyond employment as well as the marked decrease in funding and the change in funding priorities is leaving the most vulnerable Canadians behind.

Social and Economic Context

Social and economic trends in Alberta include record wealth and income along with increased inequality and poverty. This is due to high costs of living and the lowest minimum wage and social assistance, coupled with the highest inflation, in the country. This translates to more families experiencing a greater depth of poverty. Housing is the most cited concern and there has been a dramatic increase in homelessness with an increased risk of homelessness among the working poor. According Environics Research Group (2007), 57% of Albertans did not experience the benefits of the economic boom and any benefits were largely due to increased work hours. The recession has significantly reduced full-time, secure employment leading to rising unemployment, underemployment and part-time low wage jobs. Income losses among lower to middle income households are estimated at 9 to 20%. A troubling dynamic in the workplace is emerging between resident and temporary foreign workers in terms of who is retained and who is let go. It appears that temporary foreign workers are becoming an integral part of labour policy in Alberta.

Policy Responses in Alberta

The educational context reveals that Alberta's learning systems are complex, fragmented and incomplete especially for marginalized learners. The focus has been on formal and postsecondary education rather than community-based organizations that offer adult learning programs. The *Roles and Mandates Policy Framework* (2007) provides direction for bridging formal, non-formal and informal learning opportunities and our recommendations provide some guidance for this. There has been a focus on essential skills for low-skilled and unemployed workers. Inequalities in literacy are shown to correlate with economic inequality. There is growing interest in prior learning assessment and the Prior Learning Assessment Centre recommends a "third sector" learning system that is more flexible. This is echoed by the OECD which recommends combining counselling, labour training, networking capacities among educational providers, and a wider range of learning programs at the community level. They also suggest that the overemphasis on outcomes and tenuous funding or funding cuts in adult education undermine much needed learning programs.

From the Data

The following themes represent highlights of the findings from focus groups, interviews and surveys conducted by the research team.

Needs, Goals and Capacities

Adults who are on the margins of society are highly motivated to learn. Rather than being "needs" oriented, they are goal-directed, and they are already reaching some of their learning goals through numerous informal and non-formal learning opportunities. They are not fixated on learning for employment purposes but demonstrate interests that transcend immediate needs, illustrating that the natural human desire for learning still exists for marginalized adults. In order to participate in formal learning opportunities, marginalized adults will need learning environments that will help them build additional learning capacities.

Lived Realities and Barriers

We found little evidence of *dispositional barriers* that could be entirely attributed to individuals. Rather, negative or traumatic learning experiences have contributed to their fearful attitudes toward learning and their identities as failed learners.

Regarding *situational barriers*, marginalized adults are struggling with multiple responsibilities along with restricted resources. However, the most important finding is understanding how these elements interact to create a package of life circumstances that continuously tax their social, economic and emotional resource base. The coping system breaks down when "one more thing" is added and the tipping point is reached. Rather than learners not being ready to learn, institutions are not ready for learners who arrive with these kinds of precarious life circumstances.

Institutional barriers are related to insufficient flexibility and support as well as lack of accessible information for marginalized learners that make enrolment and persistence in learning opportunities difficult. Institutions often establish policies and procedures that limit marginalized learners' successful engagement with the services intended to serve them.

Structural barriers make it extremely difficult for marginalized adults to gain access to educational opportunities. These learners have experienced systematic marginalization in society based on their socio-economic position as well as a mix of other factors, such as race, ethnicity, gender and age. Defined by a complex mix of limited income and precarious life circumstances that include discrimination and exclusion, their social class is an outcome of the inequality of opportunity that is embedded in society's social structure.

Pedagogical Practices

Participants offered rich descriptions of pedagogical practices that would enable them to restart their learning journey, including small, encouraging, mentoring communities that rebuild confidence and hope. Such learning communities use experiential and peer learning strategies and create conditions that allow slower pacing, include a human element of support, involve the hands-on processing of content and offer flexibility when life circumstances demand it. We also recommend including non-Western models of learning that connect individuals to their cultural

roots and that affirm the whole learner and their communities. These recommendations cohere well with the existing literature on adult learning principles and approaches.

Clearly, the traditional classroom learning approach is not optimal for this group of learners and for some, has already been quite destructive by reproducing racism, stigma as failed learners, isolation and social exclusion. Large institutional education providers have difficulty meeting the learning needs of many of the marginalized adults reached in this study. Indeed, some of these learners have already failed in these formal educational settings. Community-based agencies and organizations are essential for providing learning opportunities for marginalized adult learners. These organizations are already using program models and pedagogical practices that are effective for marginalized adult learners.

Synthesis of Findings

Not Low-Income Adults but Marginalized Adults

The term "low-income learner" does not capture the full reality of the life situations of people who face multiple barriers in society. Rather, the learners targeted by this study are people who have experienced the compounding effects of the economic and social trends of the past twenty years but more specifically, the boom and bust cycle of the last five years. These populations not only have less economic power but they have less social status, cultural acceptance and political power. Thus, in this report, we call these populations "marginalized adults" – those who have been excluded from the full social, economic and political benefits of citizenship in Alberta and Canada by the larger structural realities over which they have no control. They are the individuals who have been left behind in our society.

Unequal Access Determined by Marginal Status

Since the 1980s, funding and educational programming for marginalized adults have significantly decreased, especially in community-based settings. Although employment-related learning opportunities have expanded in Alberta, marginalized adults cannot take advantage of these opportunities because they do not have employers willing to subsidize their learning, they cannot fund their own learning and they lack the social and financial resources to deal with the other requirements of being in an educational program (such as help when a child is sick or having access to a computer). Barriers to learning often exist because of past learning experiences as well as the precariousness of their current circumstances – including housing, job and food insecurity. However, this does not mean that marginalized adults are not involved or interested in learning. Indeed, they are highly motivated and continuously involved in learning, but it is more likely to be in informal and incidental ways as they negotiate their daily lives.

Funders and providers must recognize the importance of a broad range of needed adult learning beyond employment learning, including learning related to citizenship participation, Aboriginal educational autonomy, basic education, literacy, women's centers of learning, as well as a wide spectrum of personal interest learning.

A Web of Intersecting Barriers

Situational, dispositional, institutional and structural barriers together are complex, multiple and intersecting, like a spider's web that enmeshes marginalized adults. As a package, they are overwhelming and continuous. Predictably, they reach a tipping point – the point at which just one more stressor enters the scene. An already tenuous situation becomes disastrous for adults and families already coping with multiple challenges. This, in turn, impacts any learning program that they may be attending.

Wounded Learners

Canadian-born adults who are marginalized are highly likely to be wounded learners. School experiences of failure have left many Albertans scarred and afraid of returning to any kind of formal education. These learners have been failed by a system that operates on values of efficiency, uniformity, discipline and regulation. Shame, depression, discouragement and, sometimes despondency, make it difficult to generate the energy and direction required to start a new learning journey. While these are often identified as dispositional barriers, they actually have situational, institutional and structural origins.

Building Social and Cultural Capital for Accessing Learning

Re-entry learning experiences are best provided by community-based organizations and non-formal learning programs that can help these learners build the cultural and social capital to support their learning journeys, including social networks that will support them with tangible resources and moral support throughout their learning journey. Community building and mentoring are the antidote to alienation and exclusion.

Widening the Circle of Pedagogical Practices

It is important to widen the circle of adult education practices to include holistic learning, community building, experiential and participatory learning, critical reflection, peer learning, field experiences and job shadowing. Ensuring that non-Western perspectives are integrated into teaching and learning activities, from storytelling to arts-based activities to sacred ceremonies, is essential for many marginalized learners.

Community-Based Organizations, Not Institutions, are Ready for Marginalized Learners

Marginalized learners require small, nurturing environments where they are personally known, where the complexity of their lives is understood, and where one-on-one assistance through moral support, counselling and mentoring is provided. This is the first step in readiness where their fear, intimidation, shame, and anxiety are transformed into confidence, belief in self and an identity as a successful learner. With their smaller size and accessible locations, community-based organizations, rather than institutional education providers, exemplify the practices of flexibility, slower pace of instruction and assignments, and accommodation for precarious life circumstances that these marginalized learners require. Most importantly, these organizations enact the process of accompaniment that all learners need.

Support Community-based Organizations to Fill Service Gaps

Community-based organizations – whether literacy programs, inner city drop-in centres, pre-employment programs, immigrant and refugee-serving agencies, or Aboriginal agencies – are the success-enabling communities for marginalized learners. Building this kind of learning community, in partnership with larger institutional providers, is a return to historic University Extension models that took non-formal learning opportunities out into communities.

However, gaps in services are created when there is a lack of stable core or infrastructure funding and competition between providers driven by limited funding sources. These organizations need to have the resources to move beyond project-based funding to develop long-term, stable, well funded programs that can meet the needs of marginalized learners on an ongoing basis.

Recommendations

For Policy-makers

1. Continued emphasis on cross-ministry initiatives that tackle issues of marginalization and exclusion through the collaborative efforts of the ministries and departments responsible for social services, children's services, justice, education, advanced education, health, addictions and mental health.
2. Improve the social support structures that are required for marginalized adults to be successful. For example, more childcare spaces and subsidies, more funded time for ESL programs, enhanced home support programs, higher minimum wages that are living wages, and incentives for employers to pay for education and to create "good jobs."
3. Take the lead in acting on OECD recommendations to convene a pan-Canadian discussion of lifelong learning in order to develop a comprehensive national lifelong learning policy that is holistic and much broader than employment concerns.
4. Define learning outcomes more broadly than the current emphasis on employment outcomes, to fully represent lifelong learning.
5. Strengthen grassroots initiatives by ensuring long term operational funding for community-based organizations and by promoting collaboration and reducing competition for limited funding options.
6. Reconsider advocacy (lobbyist) restrictions for non-profit agencies that are at the front line of dealing with the fall-out from economic and social policies.
7. Support the active inclusion of marginalized adults in policy-making that affects them and encourage program initiatives in civic education that would help them obtain the skills to do so.
8. Reframe the language used to describe and define marginalized adult learners in a way that recognizes their enmeshment in a system that, in many ways, structurally disadvantages them.

For Institutional Providers

1. Offer a continuum of educational services that includes the following:
    - Provide support to community-based programs
    - Move resources (materials, staff, content) into the community
    - Develop bridging/transitional programs from the community to institutions
2. Generate policies and programming that allow maximum flexibility in timing and pacing, expected outcomes, accommodating life circumstances and outreach.
3. Promote programming that includes leadership and mentoring opportunities, community-building, experiential and participatory learning, holistic and Indigenous pedagogies, peer learning, field experiences and job shadowing, civic education and building networks with community-based providers.

For Community-based Providers

1. Enhance attention to civic education and Indigenous and other non-Western learning models within community-based learning contexts.
2. Continue collaborative initiatives among community-based organizations and maintain active efforts to disrupt the competitive model imposed by funders.
3. Strengthen a "one stop shop" approach to service provision wherein multiple services are available in accessible community locations and service providers are working collaboratively within spaces that potential learners are already visiting.
4. Continue healing and advocacy work through several initiatives including working to re-establish the pivotal advocacy role of non-profit organizations within civil society.

For Further Research

1. Conduct a review and summary of all the recent research and policy recommendations on newcomer immigrants and direct more attention to research with ethnic refugee communities in Edmonton.
2. Devote more attention to investigating the learning needs, goals, lived realities and barriers of persons with disabilities.
3. Commission a supplementary report that addresses the literature on best practices for specific groups and exemplary community-based models alongside the research findings on pedagogical practices and sites of learning programs in Edmonton.

INTRODUCTION

Purpose and Scope of the Research

The purpose of this research project was to conduct an assessment of the educational needs of diverse low-income adult populations in the City of Edmonton. In alignment with the provincial goals for ensuring high levels of access to and flexible opportunities for learning,[1] in this research project we examined the current needs of the most vulnerable groups in Edmonton, the gaps in the learning landscape and the current social and economic trends that impact provision of educational services. We also identify recommendations for more effective educational programming and to guide a stronger network among providers. This qualitative study makes a unique contribution by focussing on the experiences and voices of potential learners, their educational aspirations, the specific types of barriers they experience as well as how these barriers interact in complex ways to undermine their learning pursuits. It also offers recommendations for teaching and learning methods that are most likely to enable successful learning for marginalized adults.

The overall goal is to inform the range of adult education providers within the publicly funded advanced education system regarding the nature of learning opportunities needed, strategies for reaching populations that are not currently served by learning opportunities, ways of better meeting the needs of learners who face a range of barriers, and policy changes that could enhance accessibility and flexibility. The purpose of this study coheres with the provincial desire to create a lifelong learning culture in Alberta wherein all Albertans have the knowledge and skills to reach employment goals, enjoy a high quality of life and participate as responsible citizens.[2]

Partners Commissioning the Research

This research was commissioned by the Edmonton Community Adult Learning Association (ECALA) that is a funder of non-credit, non-profit adult education for the Edmonton region and NorQuest College that provides flexible learning alternatives (such as career laddering, recognition of prior learning, part-time career study and distance education) within an inclusive and supportive environment, thereby offering access to postsecondary education for adult learners who have a wide range of previous social, cultural, economic, and educational experiences. They specialize in adult academic preparation, English as a Second Language programming, literacy education and learner supports for students with disabilities, in addition to career preparation in business, industry, services and health care.

Together, and in alignment with the provincial priority goal of more collaboration between Comprehensive Community Institutions and community-based adult learning partners, the sponsors' goal was to obtain a current assessment of the learning needs of populations that they

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[1] *Roles and Mandates Policy Framework for Alberta's Publicly Funded Advanced Education System*, November 2007, Alberta Advanced Education and Technology.

[2] *Final Report of the MLA Committee on Lifelong Learning*, May 2002, Alberta Learning.

may not be reaching and to enhance learning opportunities through informal, non-formal and formal programming.

Research Team

The research team was comprised of a large and diverse partnership of two highly qualified experienced University of Alberta researchers and eight talented undergraduate, graduate and recently graduated students from Educational Policy Studies at the University of Alberta – all contributing expertise in relevant areas.

The principal investigator was Donna Chovanec (PhD, MEd, BSW), assistant professor in Adult Education at the University of Alberta with 20 years experience in needs assessment and evaluation research in the human services. She is currently the Chair of the Board of the Learning Centre Literacy Association and a member of the Advisory Committee for Literacy Alberta's Strengthening Pathways to Professional Development Project.

The co-researcher was Elizabeth Lange (PhD, MEd, BEd), assistant professor in Adult Education at the University of Alberta with 15 years of research, evaluation and facilitation experience for educational organizations as well as community and government organizations with an educational function. She is currently a Board member of the Edmonton Community Adult Learning Association.

The research team also drew on the expertise of Nicole Smith Acuna who was the logistical coordinator of the research activities and reviewed the Alberta context and trends literature; Evelyn Hamdon who coordinated the interview schedule and participated in all data collection and analysis activities; Trudy Cardinal who carried out data collection activities, primarily among Aboriginal populations, and also analyzed data; Ruby Smith-Diaz, who conducted interviews and surveys and generally helped out wherever needed; Colin Piquette who conducted interviews and administered and coded surveys; Zenobia Jamal who prepared the surveys and analyzed the survey data; and Laura Servage who reviewed the policy and barriers literature. All these team members contacted agencies and organizations and contributed to the analysis of the collected data. Tania Kajner assisted with the compilation of the report.

General Approach and Objectives

The project built upon, rather than duplicated, a former needs assessment done for ECALA (LeMay, 2004), while taking into account recent economic and educational developments in Alberta. In addition to identifying learner needs and service gaps, the research team concentrated its investigation on the complex barriers to learning and education. It is well known from existing global research that low-income and low-skilled adult learners typically face formidable obstacles in accessing learning opportunities, that learning opportunities typically are not flexible enough to effectively meet these complex needs, and that there is under-investment for disadvantaged learners. Yet, these learners rank high on the policy agenda of many countries as they seek to improve access and participation in adult learning.[3]

[3] Organization for Economic Cooperation and Development (OECD), *Promoting Adult Learning*, 2005.

Building on North American research by Cross (1981) and Conrad (2001), this study examined the numerous situational barriers, dispositional barriers, institutional barriers and structural barriers, and the intersections between these barriers, that impact access to learning. Thus, this research report aims to complement our analysis of newly collected data from these learners with existing recommendations from the literature, specifically how best to provide educational services to marginalized learners.

Outline of Report

The report is divided into six major sections. After this introduction, the report provides an overview of the study design including the ethics, timelines, methods and analysis of data collection, and our reflections on the research process.

Third, the literature reviews include information on the context of adult education, global findings about Canadian adult education in comparison to other countries, and the changes in the provision of adult education nationally. It then focuses on the key changes in Alberta over the past twenty years and specifically on the economic and social trends over the last five years that shape the reality of many Albertans, including their educational pursuits, and the policy context in Alberta. The section ends with a brief description of the theoretical framework that was most helpful for interpreting the findings in this study.

Fourth, the largest section of the report details the information gathered through the interviews, surveys and focus groups with key agencies, organizations and marginalized adults. From this data the findings fall into three themes, i.e., goals, needs and capacities that marginalized adults expressed, descriptions of their lived realities and the barriers to learning that they experience, and their insights and preferences for the forms of teaching and learning practices that most effectively assist them in reaching their educational goals.

In the final two sections are a synthesis of the findings in a way that illustrates the complexity and intersections between all these factors, and detailed recommendations for government policy-makers, institutional providers and community-based programs.

OVERVIEW OF STUDY DESIGN

Introduction

Based on the project team's considerable experience working with low-income and marginalized adults in Edmonton in a variety of contexts (e.g., addictions, inner city schools, immigrant and refugee communities, abused women, grassroots activism), we selected methods of collecting information that would reach people who were not usually reached in research studies, people for whom issues of access and trust would be paramount.

Therefore, we chose methods that would give us the best chance to respectfully and non-intrusively reach the most marginalized adults in our community and that, once we reached them, would give them the greatest opportunity to share their ideas with us. For these reasons, we focused the most effort on:

- Effectively using the project team's extensive community contacts to build networks and make connections with agencies and organizations that are working with marginalized adults
- Conducting open-ended interviews with marginalized adults in locations that were familiar and comfortable for them

We focused less attention on surveys, recognizing that they have considerable weaknesses in terms of accessing marginalized populations and obtaining useful information. Initially, we were unsure how much new information we would get from the focus groups with agencies and organizations because many such groups had been interviewed or surveyed in other studies recently, including a needs assessment for ECALA (LeMay, 2004) and the Community Education Roundtable survey (Fleischmann & Van Styvendale, 2008). Further, we were disappointed that the attendance at focus groups was hampered by already time-strapped agency personnel who were moving into the reduced summer programming season with fewer services and personnel. However, a number of smaller agencies that work directly on the front lines attended and the information obtained from the focus groups proved to be very important and supportive of the information gathered in the interviews with marginalized adults.

Ethics

The plan for this study was reviewed for its adherence to ethical guidelines and approved by the Faculties of Education, Extension, Augustana and Campus Saint Jean Research Ethics Board (EEASJ REB) at the University of Alberta.

We were especially concerned about the vulnerability of potential interview participants. In order to ensure informed consent, we used clear and accessible language in all written materials. In a script that we provided to agencies and organizations that were approaching potential participants, we took care to explain who was doing the study, why we were doing it and how the information would be used. We also added the following paragraph to clarify the role of the agency or organization that was contacting the potential participant: "Participating in this study has nothing to do with your involvement in our agency/organization. The research assistant will not tell me anything that you tell her/him."

We verbally reiterated all this information at the start of each interview with the participants and provided an information letter. We also took the utmost care with privacy issues ensuring that we used pseudonyms, password-protected documents and secure servers and we did not pass information with participants' names over email. No identifying information was obtained on the surveys. All materials are kept in a locked office at the University of Alberta.

Timeline and Schedule of Activities

The project officially began with a meeting with the project sponsors on May 14, 2009. This was followed by the first project team meeting on May 28 and ethics approval on June 5. After a concerted effort to make contact with a large list of agencies and organizations, we held the focus groups in June and July, the bulk of interviews occurred during July and the surveys were administered at the end of July. We spent August reviewing the relevant literature, entering, coding and analyzing data and organizing our records. In September, we began collating information for the report and writing. The project was completed in four months.

We presented a verbal mid-term report to sponsors on July 7. At that time, we obtained approval for our recommendations to modify the contract by decreasing the number of focus group participants, increasing the number of interviews and extending the report deadline.

Methods for Collecting Information

Working with Agencies and Organizations

Our first step was to contact the agencies and organizations in Edmonton that are already working with low-income adults.

Within our team of nine researchers and with assistance from the project sponsors, we generated a list of **132** agencies and organizations and then prioritized each one based on its relevance to the study. Each member of the team then contacted a group of agencies and organizations via email, phone and/or face-to face-visit. Members of the team had existing working relationships with many of these agencies and organizations.

In total, we contacted **112** agencies and organizations although not all responded or were able to participate. After making an initial contact with each agency or organization, we followed up with a letter explaining the project. We asked the agencies to assist us with all three data collection methods used in this study (to be described below). (See Appendices for introductory letter and a list of the agencies contacted.)

One of the largest methodological challenges of the project was the timing of the data collection. In June, many programs were wrapping up for the summer so they were especially busy, already short staffed for the summer and/or had scaled down or finished their programming. Nonetheless, **32** agencies and organizations were involved in one or more aspects of the study (i.e., 28% of those contacted). (See Appendices for a table of participating organizations.)

Focus Groups

Focus groups are a particularly efficient means of gathering the best and most information in short periods of time (Cohen, Manion & Morrison, 2007). Therefore, we invited agency and organization representatives working with marginalized adults to participate in a focus group, offering a variety of dates, times of day and locations close to agencies. Focus groups were held at:

- E4C at Alex Taylor School
- Edmonton's Food Bank
- Learning Centre Literacy Association at Abbottsfield Mall
- Learning Centre Literacy Association at Boyle Street Community Services (2x)
- University of Alberta, Education building

Thirty-nine (39) people representing 28 agencies attended one of six, 1.5 hour focus groups held in June and July. The number of participants at each group ranged from 1 to 13. There were a facilitator and a recorder at each focus group session. All sessions were audio taped and then professionally transcribed although the poor sound quality of some sessions precluded good quality transcription.

At the focus groups, we gathered brief written information about the work of the agency or organization and obtained each representative's written consent to participate in the study. Then, the facilitator posed a series of open-ended questions for group discussion related to defining a "low-income adult learner" as well as challenges and learning opportunities for marginalized adults. (See *Guide for Focus Groups* in Appendices.)

The first question (How would you define a "low-income adult learner"?) generated considerable discussion that immediately raised philosophical, systemic and policy issues. It was clear from the thoughtful and thought-provoking comments that agency representatives had a solid understanding and analysis of the lives of the marginalized adults with whom they worked.

Interviews

Marginalized adults are often struggling with multiple and complex barriers that makes obtaining meaningful research information difficult. Therefore, we chose to conduct open-ended interviews as a means of gaining more insightful and in-depth information from this population.

We used a variety of strategies for reaching marginalized adults. The first set of strategies relied on the assistance of trusted workers in the agencies and organizations that work with these populations in Edmonton. We counted on their cooperation and involvement because they have the best knowledge and good relationships with the people with whom they work.

Agencies and organizations referred potential interviewees to us in three ways.

- Using a script that we provided, agency workers directly contacted marginalized adults who they believed might be interested in being interviewed for the study. From those

that were interested, workers obtained consent to provide us with their name and phone number.

- In some places where adults were gathered for an activity, administrators gave us permission to invite service users to participate in an interview "on the spot."
- In one agency, the contact person advised us to post a notice inviting potential participants to contact us for an interview.

Another method of recruiting interview participants was through contacts with marginalized learners in our own community networks.

Our objective for recruitment was to reach the most marginalized. We set targets of:

- 2/3 women
- 6 Aboriginal persons
- 6 non-English speakers who required an interpreter in order to fully participate

We were highly successful in recruiting adults living and using services in the inner city and northeast Edmonton and in urban Aboriginal communities. These are frequently under-reached populations.

We were disappointed, however, in our minimal reach into newcomer immigrant communities despite our extensive network of contacts with immigrant-serving agencies. We believe that this may be related to the high expectations placed on these agencies and their clients in numerous studies related to immigrants and immigration in recent years. Nonetheless, towards the end of the project, one agency invited us to conduct drop-in interviews with clients who were waiting to see counsellors. For this reason, we did not have interpreters available and this may have affected the information obtained.

We were also hampered by our limited network in agencies and organizations that work with persons with disabilities.

As with the agencies and organizations, we again faced the challenge of reaching people during the summer months when programs were already finished or reduced for the season. However, with excellent cooperation from the agencies and organizations and motivated participants, we conducted 39, 20-75 minute interviews in locations throughout the city during July (15 more than the 24 originally proposed).

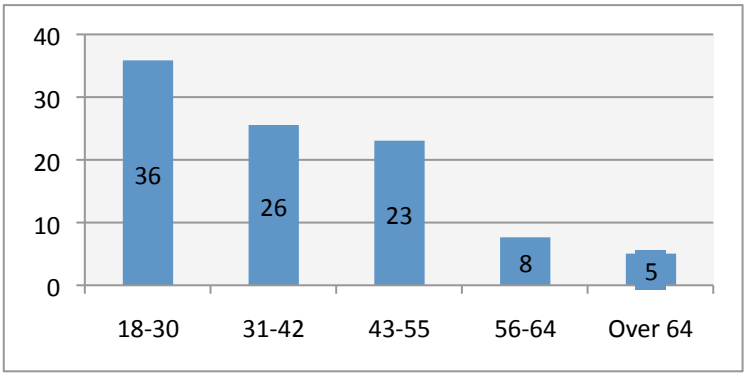
We gave interview participants an information letter and obtained their verbal consent to be interviewed and to be audio-taped. (See Appendices for information letter to adult learners.) We provided an honourarium of $25 to each interview participant as well as bus tickets and/or $15 to those who required assistance with transportation or childcare in order to participate.

The self-identified demographic makeup of the **39** interview participants was as follows:

- 24 women (62%), 14 men (36%), 1 unidentified (*met target*)
- 20 Aboriginal people (First Nations, Métis and Inuit) (51%) (*exceeded target*)
- 22 English as a first language (56%), 4 Aboriginal languages (10%), 11 Other (28%), 2 unknown (*met target but without interpreters*)

- Of non-Canadian participants, 4 European ethnic origin (10%) and 9 non-European ethnic origin (23%)
- Age range from 19-86

Age of Interview Participants (%)



We used an interview guide that included basic demographic information and three main topic areas (learning experiences, barriers to learning and learning goals/needs), with supplementary tips and prompts, to be explored by the interviewer. (See *Guide for Interviews* in Appendices.)

Interview participants were generally happy to participate in the study by sharing their stories with us. They appeared comfortable being interviewed in the learning environments that were familiar to them (e.g., program spaces, drop-in centres, homes).

Surveys

Because ECALA had recently conducted a learning needs assessment that included learner surveys (LeMay, 2004) and because surveys typically pose significant challenges for marginalized adults who may be transient, are not always accessible by phone, have low literacy levels or lack proficiency in English, we focused less attention on surveys than on the other data collection methods.

Therefore, we decided to administer a short survey using convenience sampling of the target population guided by key informants (Cohen, Manion & Morrison, 2007). Given the time constraints, we decided that the quickest way to find enough potential participants for this task was to administer the survey in existing groups that were meeting over the summer. Again, we turned to our contacts in the agencies and organizations for assistance.

As a result, we administered a 15-minute written survey at the following six locations during July:

- Boyle Street Community Services
- Distinctive Employment Counselling Services of Alberta (DECSA)
- Millwoods Welcome Centre for Immigrants
- Native Senior's Centre

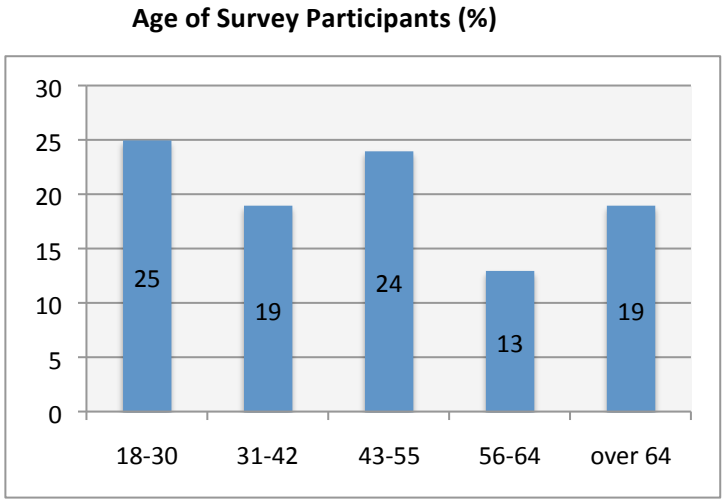
- Oteenow Employment and Training Society
- Sacred Heart Church of the First Peoples

We attached an information letter to the surveys and, in addition to gathering basic demographic information, the survey included questions about needs and barriers, some of which were similar to questions asked by LeMay (2004). (See *Learning Needs Survey* and information letter to adult learners in Appendices.)

We provided bus tickets or $5 coffee gift certificates as honouraria to the participants. We learned that we should have had tobacco for indigenous elders.

A total of **105** surveys were completed. The self-identified demographic make-up of the survey participants was as follows:

- 48 women (47%), 54 men (52%), 1 transgendered (1%)
- 52 Aboriginal people (50%)
- 72 English as a first language (69%), 20 Aboriginal languages (19%), 12 Other (11%)
- Of non-Canadian participants, 1 (1%) European ethnic origin and 33 (12%) non-European ethnic origin
- 14 (13%) born outside of Canada (10 arriving within the past 4 years)
- Age range 18 to over 64



Because this information was collected late in the project and we had decided to put less attention on this method, there are a few limitations. First, sampling was limited to the few agencies that were easily accessible within a short time frame and does not include the diversity or the quantity that would be expected for generalizability. Second, although we attempted to use clear and non-intrusive language and we provided assistance to participants with language or literacy challenges, time constraints precluded a careful piloting of the survey and we realized later that some of the questions were not as clear as we had hoped.

Literature Reviews

There are vast numbers of global and national studies addressing barriers to learning and access to educational participation. Therefore, the literature review team needed to be selective and to capture only the key elements that are well supported across numerous studies.

We limited our search to materials released in the last five years, with some exceptions. While we concentrated on scholarly research literature from relevant databases, largely within Canada, this was augmented by policy documents and statistical research from various government organizations, research reports from local social service agencies, reports from national public research organizations, and international reports about global trends and comparative evaluations of Canadian adult education. We also only searched the literature that addressed the topics of barriers and access to learning of marginalized groups generally, rather than literature related to specific subgroups such as literacy learners or newcomer immigrant learners. To give primacy to the voices of the participants, we conducted the literature reviews *after* we began the analysis of the focus groups and interviews.

Analyzing the Information

We analyzed the interview transcripts first in order to privilege the voices of marginalized adults themselves. Through the process of reviewing the transcripts, a subgroup of four project team members identified close to seventy codes based primarily on the main objectives of the project. These team members independently coded subsets of the transcripts using AtlasTi qualitative data analysis software. Later, a second team member coded a random selection of six transcripts to ensure inter-coder reliability.

For the purpose of analysis, we then combined a number of similar codes and printed reports with all the quotes from the transcripts that had been coded. The subgroup then met together to systematically review the coding reports for key themes. We recognized significant cross-over in the themes that emerged from different coding reports. The whole project team met twice to review and refine these themes into a broader analysis.

Three project team members from the subgroup read the focus group transcripts, established twelve codes, again based primarily on the objectives of the study, and then entered the coding into AtlasTi. In consultation with the whole team, we determined that there was considerable support for the themes identified in the analysis of the interviews.

A separate subgroup of two entered the surveys into SPSS, ran frequencies on all the survey questions and cross tabulated selected questions based on gender and ethnicity. Given the small numbers of ethnic minorities represented in the sample, only gender had sufficient numbers to make the comparisons meaningful. Again, the information was consistent with the interview data.

Another three-person subgroup examined the literature for themes, cross-referenced it by stakeholders and synthesized it by the major themes. As the empirical data was analyzed, the only literature included in the final report was the literature most pertinent in providing a backdrop for the data, an interpretation of the data, or in covering areas that did not emerge in the data. The analysis of the literature also proved to be consistent with the findings from the three data collection methods.

Reflecting on the Research Process

This research project was strengthened by a number of factors including the people and the process. As in any project, there were also challenges. In this project they related primarily to timing and timeframe. We also acknowledge some limitations.

Strengths

The first strength was the team members' depth of experience, vast network of community contacts, academic background in adult education, racial and ethnic diversity, and unflagging enthusiasm and energy. The second was the cooperation and goodwill of the many community-based agencies and organizations that participated or would like to have participated in the project. The third was the extensive administrative, logistical and technical support provided by the University of Alberta, Faculty of Education. Finally, we include the trust and keen interest of the sponsors from ECALA and NorQuest as pivotal to our success.

The second strength was our approach. A project of this scope, one that aims to go beyond what is already known or assumed about the target population, requires an approach that is not bound by existing policies or program frameworks. It also requires extensive access to the most hard to reach populations and a research approach that allows them to speak. A most important asset of this project was our ability to mobilize our existing community networks to gain access to marginalized learners in the inner city, northeast Edmonton and Aboriginal communities. Another was the open-ended interview approach that, by having very few targeted *topics* (instead of a long list of research *questions*), encouraged the interview participants to tell the story of their learning experiences in ways that made sense for them. Positioning the research within an academic environment also contributed an approach to the research that drew upon critical analytical frameworks and that framed the research as *praxis* – the dynamic interrelationship of theory and practice to which the entire research team was committed.

Challenges

The greatest challenges during the project were related to timing and timeframe. As already mentioned, the summer timing was difficult for the agencies and organizations to accommodate and it was also difficult to find participants at that time. The timing also made it difficult to find full time research assistants for the project team. This introduced the challenge of coordinating a large team of part-time workers over the summer months when holiday schedules occasionally interrupted the flow of the research process.

Limitations

Because of the tight timelines (i.e., four months to completion), we had to make hard choices throughout the project about what to prioritize, what to leave out, when to move on to the next phase and what to accept as "good enough." The specific challenges faced in this project resulted in some limitations. The first is our weaker reach into newcomer immigrant communities and the absence of attention to refugee communities and to persons with disabilities. Second, as described above, we put less attention on the surveys, which then limits their statistical usability. Third, we were not able to cover exemplary practices of adult education for *specific groups* of marginalized adults in the literature search.

FINDINGS FROM THE LITERATURE REVIEWS

In the following sections, we synthesize the findings from the literature review regarding the educational, social, economic and policy context that affects the provision of and access to adult learning opportunities in Alberta.

Context of Adult Education

The importance of lifelong learning to the individual and society at large has been a central policy position of OECD countries since the mid 1990s (Rubenson & Walker, 2006). Lifelong learning is believed to foster both economic wellbeing and social inclusion. Ideally, all members of society should have access to the benefits of learning. Yet, as lifelong learning has become a central focus of policy and research, evidence and awareness has mounted that there is a great divide between the learning "haves" and the learning "have nots" (Field, 2006).

Contradictory Movement in Adult Education

In sum, a contradictory movement is occurring in the field of adult education, both in North America and Europe – the simultaneous shrinking of access to learning opportunities for marginalized learners as well as expansion of learning opportunities for largely middle class learners with access to adequate personal or workplace resources. This is a vitally important reality in a society that has made adult learning a central plank in national policies related to economic and social wellbeing. While, in various policy documents over the last two decades,[4] Canadian governments have promoted lifelong learning, a learning society and an environment of inclusion, numerous adult education scholars have observed that the way the policies are implemented results in the "abdication of responsibilities to lifelong learning for the most vulnerable citizens" (Rubenson, 2006). Adult education critics have described this dynamic of cuts and refunding of specific program areas as the loss of social purpose adult education and the rise in instrumental adult learning that orbits around the ideological and economic creation of a globally competitive market economy. Other global commentators have observed a similar evolution in other countries where the learning "rich become richer," while the "learning poor" are persistently excluded and marginalized (Field, 2006; Myers & deBrouker, 2006; Wurzburg, 2006). It is not enough, states the OECD (2005), to improve levels of learning overall – equality in learning opportunities is equally important for economic growth and stability.

Community Origins of Canadian Adult Education

During the late 1800s and early 1900s, Canadian adult education was largely located in social movements that provided education to groups who were economically marginalized or socially excluded from full expression in Canadian life – whether Frontier College's education of men in mining and lumber camps, or the Antigonish Movement's empowerment of fisherfolk and miners through cooperative enterprises, or Women's Institutes where women shared basic

[4] Government of Canada, *Canada's Innovation Strategy* is included in two reports: *Knowledge Matters* and *Achieving Excellence*, 2002

household and farming knowledge with each other in far flung isolated communities, fostering both community development and the suffrage movement.

The history of adult education in Canada then, has been grounded in the provision of adult learning as part of a larger social covenant comprised of building social cohesion, social equality and inclusive, participatory citizenship. Adult education initiatives sought to reach vulnerable populations and those living in isolated conditions, and to address the needs of specific groups such as women, farmers, workers or newly arrived immigrants. Adult education programs historically have been innovative and flexible, building upon the collectivity that was required for simple survival and national cohesion. These programs met regional needs, fostered community self-reliance, built traditions of self-directed, participatory governance as well as generated cooperative enterprises as protection against exploitative interests. As the OECD discovered, though, many current participants and facilitators within the Canadian adult education system today are unaware of this exemplary, compelling history.[5]

Radical Shift in the 1980s

In the succeeding years up to 1980, the professionalization and institutionalization of adult education led to a gradual shift of learning opportunities away from community-based organizations and social movements toward formal sites of learning, but the central commitment to marginalized groups remained. However, since the 1980s, the policy and funding agenda in Canada, which is based on the school of neoliberal economic thought, has eclipsed the liberal humanist commitment among adult educators (Rubenson, 2006). In the last twenty years, the landscape of adult education provision has shifted radically as resources have been reallocated toward human resource development, corporate training, professional learning and generally work-related learning, resulting in the desiccation of education for broader social purposes. In its comparative report on Canada relative to the American and European adult education realities, the OECD raised numerous substantive issues, including the domination of employment learning.

Domination of Employment-Related Adult Learning

There is no shortage of critiques that adult education programs, in our present political and economic climate, focus too much on "learning for earning" and not enough on citizenship, too much on individual learning and not enough on learning communities that foster meaningful, collective learning and social and civic participation (Field, 2006). For instance, only 17% of all adult learners indicate they participated in adult learning unrelated to work in 2003 and only 8% of these learners received direct government support (Rubenson, 2006). The remainder of work-related learners received financial support from employers (52%) or used their own resources (40%). More specifically, in 2003, only 22% of persons with the lowest level of literacy participated in adult learning while 69% of those with the highest level of literacy participated. In 2005, only 26% of those with less than a high school degree participated in adult learning opportunities while 65% of those with a university education participated (Rubenson, 2006). Thus, it is clear that the majority of adult learning is employment-related and that it is those who already have a high level of education and are in professional,

[5] Organization of Economic Cooperation and Development, 2002, *Thematic Review on Adult Learning*: *Canada Country Note*

managerial, supervisory or technical positions who are continuing to participate in learning opportunities, either with their own resources or with financial support from their employer. In strong agreement, the OECD[6] raises the same concern – that Canadian adult education has become dominated by employment-related adult education.

Unequal Access

While Canada's participation rates in formal education are relatively high compared to all OECD countries, with 80% of the population aged 25-64 having an upper secondary education and 19% completing a university education, the OECD notes that there are still regions and populations where school completion and literacy levels remain low (OECD, 2002; Canadian Council on Learning [CCL], 2009; Livingstone & Scholtz, 2006). According to the Adult Education and Training Survey (1998), only 27.7% of adults in Canada participate in some form of adult education, almost half of Scandinavian rates of participation (approx. 50%) but comparable to American, Australian and British rates.

Therefore, while adult education is dominated by employment-related programs, the participation in adult education programs overall is still too low (p. 14) and access is unequal for those with the lowest levels of literacy and educational attainment. Particularly, Myers & deBrouker (2006) found relatively low learning participation among some groups of citizens, including rural Canadians and First Nations young adults. Similarly, the Conference Board of Canada suggests that employers do not understand the importance of training and, except in Quebec which has policy incentives for employers, most employers under-invest in such programs. Finally, the OECD notes that successive governmental withdrawal from adult education funding, often in favour of programs for youth, further entrenches under-provision for adults. In connecting adult education and democratic participation, Conroy & Barot (2001) found that Canadians have a weak sense of citizenship and low political efficacy by global comparison. In particular, Canadians who are marginalized in the labour market are also especially marginalized politically.

Disconnect between Labour Market, Knowledge and Education

Bouchard (1998, 2006) has researched the link between the labour market, knowledge and education – given that Canada is building a knowledge economy as part of its competitiveness strategy. At the highest levels of education where there is a high opportunity cost to the program, income levels do rise in a one-to-one relationship, where the higher the degree achieved, the higher the income received (2006, p. 166). Overall, however, there is no linear connection between education and employment because there can be a mismatch between training and available jobs just as there can be low availability of jobs or incorrect predictions about needed competencies (1998, p. 130-131). Considering higher levels of education as equivalent to a more competent and more fully employed workforce is a faulty assumption given the rise in educational rates amid higher unemployment and underemployment rates over the last 20 years. Further, there has been a simultaneous upskilling in small parts of the labour market but a deskilling of larger parts of the labour market creating an overeducated workforce (1998, p. 133). Bouchard concludes that the education system is a key instrument in

[6] Organization of Economic Cooperation and Development, 2002, *Thematic Review on Adult Learning*: *Canada*

creating economic stratification by providing signals (credentials) that have a determining influence on the economic potential of individuals (2006, p. 167).

Underserved Populations

Unemployed and Underemployed

Most importantly, the OECD notes that those with no stable connection to employment (the poor and working poor, Aboriginal groups, women, the disabled and elderly) have much less access to adult education. They suggest that this is more about institutional factors and a lack of program supply than a lack of motivation and demand on the part of learners, as exemplified by long waiting lists for numerous programs. Moreover, they note that few resources are designated for adult education programs without explicit economic purposes, such as vital learning programs related to community development, citizenship participation, Aboriginal education autonomy, basic education and literacy, women's centers, political education, volunteerism, international development, programs for the working poor as well as personal interest learning (p. 8). To illustrate this neglect, findings from the International Adult Literacy Survey indicates that only 9.8% of Canadians participate in non-occupational learning programs, which they conclude is the direct result of the funding withdrawal that occurred during the 1990s and the steady decline thereafter.

Myers & deBrouker (2006) note that employer support for further education tends to favour the already educated. Credit and non-credit formal learning opportunities are biased toward employees of larger organizations as well as managerial and professional workers (Desjardins, Rubenson & Milana, 2006; Livingstone & Scholtz). Conversely, employers who rely on low wage/low skills labour have few incentives to facilitate or fund learning opportunities for their workers (Field, 2006; Myers & deBrouker, 2006). Individuals who are detached from the labour market may experience poorer returns on investments in education and training than those who undertake training directly related to current employment (Baran, Bérubé, Roy, & Salmon, 2000). People who are detached from the labour market, either because of youth and inexperience or long stretches of underemployment or unemployment, are more likely to lack the social networks that may help them gain work.

Low Literacy Groups

In terms of underserved populations, 16.6% of Canadians have Level 1 literacy and 25.6% have Level 2 literacy. In total, 42.2% of Canadians are thought to have a literacy level too low for their current roles as workers, citizens and family members. Yet the OECD cited inadequate provision of Adult Basic Education in all provinces, with long waiting lists for these programs and a consistent lack of policies and funding to address this dire situation.

Aboriginal Groups

Aboriginal groups in Canada continue to have the lowest incomes, highest poverty rates, highest education dropout rates, lowest educational achievement and worst health indicators (p. 20).

> From an institutional perspective, the problem has been typically defined in terms of low achievement, high attrition, poor retention and weak persistence, etc., thus placing the onus for adjustment on the student. From the perspective of the Aboriginal student, however, the

> problem is often cast in more human terms, with an emphasis on the need for a higher educational system that respects them for who they are, that is relevant to their view of the world, that offers reciprocity in their relationships with others, and that helps them exercise responsibility over their own lives. (Kirkness & Barnhardt, 1991, p. 1)

Three educational options are debated within the Aboriginal community: purely Aboriginal education institutions that maintain traditional epistemologies and holistic pedagogies, full participation in mainstream institutions, and a bicultural model that enhances tribal identities and values alongside mainstream education and occupations. The OECD suggests that Aboriginal peoples should have adequate choice and access to all these alternatives including bridging programs into mainstream educational opportunities.

Working Poor

The working poor are mainly older workers in low-wage, part-time or seasonal jobs that are often associated with the extractive or service industries. The OECD suggests that these workers need to upgrade or change occupations to rise out of poverty. However, the complexity of issues that the working poor face make accessing education difficult. The OECD suggests that educational providers consider how their policies actually undermine access to learning for the working poor (p. 50) and they recommend special admissions, flexible pedagogy, and innovative funding approaches as well as systematizing Prior Learning Assessment and Recognition (PLAR) for both informal and previous formal learning.

Reaching Underserved Populations

For reaching underserved populations, the OECD cautions against assuming that more volume of information or additional sources of information are the answer. Rather, they recommend using innovative outreach strategies that build on the overwhelming data that suggests most adults come into non-formal learning sites based on word of mouth through a variety of social networks, including community-based organizations. Finally, they recommend that learner competence in navigating program decisions and enrolment processes is needed, as are flexible part-time types of programming, moral supports and stronger positive reinforcement mechanisms for participation. Together, these initiatives would assist learners in making a transition into full-time, conventional learning programs.

Adult Education in Alberta

Alberta's post-secondary system is facing many of the same issues identified for Canada at large, and for other OECD countries, including aging populations, growth in demand for post-secondary education, and the challenges of educating an increasingly diverse population for a constantly changing labour market. Alberta does, however, face some unique concerns based on its own provincial demographics and resources.

A strong resource sector offering plentiful high-wage jobs has meant that many younger Albertans – particularly young men – have moved directly into the labour force with a high school diploma or less (Alberta Advanced Education, 2005). Yet, a large proportion of Albertans perform below minimum literacy standards and 70% of new jobs being created require a post-secondary education (Alberta Advanced Education and Technology, 2007). The booming Alberta economy swelled the number of immigrants settling in the province, many of whom require language training and transition programs to gain employment equivalent with the

education and experience they bring from their home countries (Alberta Advanced Education, 2006b). Along with other prairie provinces, Alberta is experiencing above average growth in its First Nations population (Alberta Learning, 2003). The province's First Nations people live in both remote and urban communities, and each of these settings poses distinct challenges for reaching Aboriginal populations with learning opportunities.

Summary

In conclusion, together both the OECD and Canadian scholars agree that the turn away from a broad base of adult education opportunities that address life-wide and life-long issues beyond employment, as well as the marked decrease in funding and the change in funding priorities, is leaving the most vulnerable Canadians behind. The OECD suggests that these issues are partly due to a lack of understanding about the nature of lifelong learning. They advocate a vision of lifelong learning that goes well beyond the sole focus on employment to a vision that includes building social capital within communities and attending to the entire adult life cycle and multiple adult roles in a myriad of ways. They recommend that Canada convene a pan-Canadian forum to discuss the provision of adult education across the country and that Canada overcome the federal-provincial policy tensions to develop, not only postsecondary education policies, but a holistic lifelong learning policy (p. 9). They stress that Canada must live up to its "powerful national rhetoric" and pay particular attention to three key populations that are underserved in adult education and who require enhanced access – low literacy groups, Aboriginal people and the working poor (p. 17). They recommend clearer and more coherent policies, a division of labour among providers, stronger political power for traditionally underserved groups, more generous and long term funding, more learning from exemplary provincial programs, and consensus on appropriate pedagogies that would assist in serving these populations in an integrated way across the provinces.

Social and Economic Trends in Alberta

In this section, we turn to the social and economic trends in Alberta that are shaping the provision of adult education in Edmonton and in Alberta.

Two Decades of the Alberta Advantage

During the 1990s, Alberta was a Canadian microcosm for government and corporate implementation of policies borrowed from the neoliberal economic school of thought. The year 1993 marks the beginning of the "Klein Revolution" that began to restructure the public sector as an extension of corporate restructuring (Harrison & Kachur, 1999; Harrison & Laxer, 1995; Taft, 1997; Taft & Steward, 2000). Under the banners of the "Alberta Advantage" and Ontario's "Common Sense Revolution," the Alberta and Ontario governments were able to redefine the role of government and the private sector (Harrison & Laxer, 1995), recalibrating their economies to ensure a competitive edge in a global economy through developing a knowledge-based and high tech economy. Such an economy requires higher educational achievement among the general population while remaining heavily dependent on resource extraction industries that are less dependent on educational attainment.

Restructuring Public Services

The key idea was that social spending was out of control and had created a large debt and deficit. Despite federal government statistics that do not support the contention that social spending was a key cause of the debt and deficit,[7] the Klein Revolution restructured the public services in Alberta through the following initiatives:

- Reducing the size of government by downgrading or eliminating specific public services
- Eliminating the debt and deficit with these savings
- Lowering corporate taxes to attract international business interests
- Deregulating public services, i.e., utilities, to increase business opportunities and profits
- Privatizing aspects of public services, particularly in education and health, but also liquor stores and registries, among others
- Large wage cutbacks
- Reducing union power by undermining existing contracts

Massive or rather "brutal" cuts, as the Tories described it, were carried out in education, health care and social assistance leaving many without jobs and also without access to the social services they needed more than ever. In 1994, the Alberta government announced reductions in education funding of 12.4% per pupil or $239 million over four years. Peters (1999) suggests that in reality it was 15.6%, without considering inflation and population growth. Salary rollbacks, grant cuts and the loss of positions across all the primary, secondary, and postsecondary education sectors were significant.

Dramatic Increase in Alberta Poverty

The cut in government services and jobs came close on the heels of corporate restructuring, with Alberta recording its highest level of unemployment ever at 9.7% in 1993. The ranks of the poor doubled between the years 1993 and 1995,[8] representing almost 20% of the population. Welfare rolls were cut by 60%, as were social assistance payments, leading to a heavy increase in use of food banks, child poverty and homelessness.[9] Of the six major cities in Canada, Edmonton had the highest percentage of families living in poverty. Since this time, Alberta has seen a persistent growth in social inequalities, confirmed in the most recently released report of the Edmonton Social Planning Council (2009).[10]

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[7] Statistics Canada indicates that the key reasons for the debt and deficit were the high interest rates during the 1980s (44%), deferred corporate taxes and wealthy tax evasion (50%); general govt deficit spending (4%); social programs (2%).

[8] Before federal government transfer payments.

[9] Trends and statistics from Statistics Canada and the Edmonton Social Planning Council, February 2000.

[10] *Tracking the Trends*, Edmonton Social Planning Council, 2009.

Private Sector Involvement in Public Services

In sum, Alberta was the first province to attack the notion of equality of opportunity and replace it with the "new logic of competition, effectiveness, standards, choice, vocationalism and marketization" (Harrison & Kachur, 1999, p. xiii). The goal was to reduce the size of the welfare state and increase the role of the private sector in the social services. Statistics indicate that private sector involvement in education increased anywhere from 15 to 35% through business-education partnerships, business input into policies and curriculum, advertising space in educational institutions, as well as targeted business funding for services and infrastructure in schools and postsecondary institutions, often through P3s (private-public partnerships). Simultaneously, the Conference Board of Canada and the Business Council on National Issues suggested that the education sector was underperforming and they developed an Employability Skills Profile (1998) that stipulated the labour skills needed for the New Economy, including positive attitudes and behaviours, flexible and positive attitudes to change, adaptability and ability to work with others in multi-task teams for high performance.

Reduction in Education Funding for Marginalized Groups

Since then, reinvestment has occurred in education but in targeted ways through performance envelopes that tie funding to performance indicators shaped by government priorities. In postsecondary education, funding was increased to the applied sciences and information technologies and decreased to other disciplines. Likewise, there was a substantial reduction in the funding of adult education programs that were affirmative action programs or that increased access for minority groups, such as English as a Second Language, Adult Basic Education, women's centres, literacy programs, anti-racist educational initiatives and so forth. Rubenson (2006) calls this the second generation of lifelong learning, that shifted the understanding of lifelong learning toward human resource development, in response to a larger market agenda.

However, by the late 1990s, it was clear that the marginalization of large segments of the population could threaten economic stability, resulting in a "softening of the economistic perspective" (Field, 2003; Rubenson, 2006, 2004). New policy documents on lifelong learning began to re-include references to civic participation and educational access alongside market participation. Nevertheless, upskilling, training and professional development remain the primary agenda, in part to build a "world-class workforce" that will retain competitiveness, particularly in the face of the dramatic market fluctuations over the past five years.

Economic and Social Trends in the Last Five Years

Rise in Wealth and Deeper Poverty

In the last five years, Alberta has experienced both a heated boom during 2005-2008 and an economic crash from November 2008-2009. General Canadian statistics indicate that wealth and income has increased overall in the last 25-30 years, but inequality has also increased. Only the top 20 percent of households have prospered and this reality, together with a fraying social safety net, has resulted in more fully entrenched poverty (CIW, 2009). Kolkman (2008) from the Edmonton Social Planning Council confirms this reality in Alberta. "Alberta children and their families who live below the poverty line experience, on average, a greater depth of poverty than their counterparts in other provinces. The depth of poverty in the province of Alberta and

in... Edmonton and Calgary... has consistently been worse than the national average in each of the 18 years measured" (p. 9).

Trickle Up Boom Benefits

Even during the boom, the positive effects reached only a selective population. A survey conducted by the Environics Research Group in March of 2007 found that although people had a general sense that the economy was good, more than half (57%) did not feel they were personally benefitting from it. The remaining respondents either felt they were "worse off (17%) or about the same (34%)." Albertans with "annual household incomes below $60,000 (22%-23%) [were] twice as likely as those with incomes of $100,000 or more (11%) to say they are worse off because of the current boom." Edmontonians in particular were more inclined to indicate that they were either not impacted (35%) or felt worse off because of the boom (16%), and almost half of respondents expressed concern about whether or not the boom itself was sustainable (49%). The Parkland Institute confirmed that the dramatic boom growth had specific distribution characteristics among Alberta's population. "The findings reveal[ed] that middle income Albertans [were] no better off due to the boom while low income Albertans [were] worse off. The data also reveals that the benefits of Alberta's boom are trickling up to corporations and Alberta's wealthy and high income earners" (Gibson, 2007, p. iii).

High Living Costs, Lowest Minimum Wage, Lowest Social Assistance, High Inflation

Kolkman (2008) reports, "Alberta's living costs, especially for housing, are amongst the highest in Canada, placing additional burdens on low income children and their families" (p. 1). People living on fixed incomes experience the burden most, as the market basket price increased significantly without a corresponding increase in income. In a series of focus groups with Edmontonians conducted in 2007, Vibrant Communities Edmonton found, "*All* focus group participants expressed concern about the rising cost of day-to-day basic purchases such as food, transportation and utilities." While standard purchases cost more, "wages are not rising in proportion, making it increasingly difficult to cope and impossible to save for the future" (Vibrant Communities Edmonton, 2007, p. 41). Participants indicated that they were spending more of their income on food and housing than ever before, and reported increased levels of stress and anxiety due to financial difficulties.

There is much evidence to show that the boom simply passed by most middle and low income earners. "A look at homelessness, social assistance incomes and minimum wages reveals that many [were] worse off because of the boom" (Gibson, 2007, p. iii). Kolkman (2007) agrees, "Many participants in the focus groups said that even one full-time job is not sufficient to pay the bills and put a roof over their heads. Participants spoke of the difficulty of juggling several part-time jobs, working in casual positions without benefits, or in working in positions below their qualifications" (p. 7). Thus, working fulltime even in a boom economy can still result in poverty. Vibrant Communities Edmonton found that many segments of the Alberta population "[were] working for minimum wage, in casual positions without benefits, or in positions below their qualifications, often more true for new immigrants or refugees" (p. 43).

In 2005, 8.6 per cent of working Albertans aged 18 to 64 were living below the low income cut-off (Kolkman, 2007, p. ii). Since then, despite record wealth being created in Alberta and a recent increase in minimum wages, Albertans are still earning the lowest minimum wage in the nation. The 2005 increase did not bring the minimum wage in line with the booming economy as it merely caught up with the inflationary losses from previous years. In comparison to the

boom in the 1990s, the minimum wage during the boom in the 1970s was almost 50 percent higher in terms of what it could buy (Gibson, 2007, p. iii).

Another area where the boom benefits have not been evident is in social assistance rates, the lowest in the country. Social assistance rates are not indexed to inflation and, like minimum wages, their true value is constantly eroding. According to the National Council on Welfare, "Lone parent families in Alberta, Canada's richest province, received just $12,32 – only 48 percent of the poverty line. These individuals and families are being hit hard by the boom as rent increases and inflation eat away at their limited incomes" (cited in Gibson, 2007, p. iii,). Simultaneously, Alberta's inflation rate from 1989 to 2007 significantly exceeded the national average.

Dramatic Increase in Homelessness and Risk of Homelessness among Working Poor

The boom was comprised of a rapidly expanding economy, a tight labour market and strong in-migration, putting increased pressure on housing prices and rental markets across the province. Vibrant Communities Edmonton (2007) found that "finding affordable, decent or liveable, long-term rental housing was the most frequently cited concern." "Over 2006 and the first half of 2007… the average single family home and condominium selling price jumped 52% in Edmonton. Seven Alberta jurisdictions saw their vacancy rates fall below one percent, while two recorded a rate of zero percent." This caused rent increases far in excess of inflation. Between October 2005 and October 2006 the average rent for a two bedroom apartment increased by 10.4% in Edmonton, causing a crisis in homelessness. In 2006, homelessness in Edmonton increased by 19% with an associated rise in the numbers of Albertans at risk of homelessness (Gibson, 2007, p. iii). There was also a pronounced change in the face of the homeless – from those with mental health issues to increasing numbers of working poor and whole families (Gibson, p. 5). The problem for many was simply being "able to pay the rent… [or] having to decide between paying the rent and making other purchases such as food or children's school activities" (Vibrant Communities Edmonton, p. 40).

Highest Working Hours in Canada

Surprisingly, the small increases in income experienced by middle income Albertans throughout the boom period were not because of increasing wages. Rather, any increases experienced were simply the result of increased working hours (Gibson, 2007, p. iv). In January 2007, Statistics Canada announced that Albertans were working harder than any other Canadians. "Workers in Alberta averaged 1,880 hours a year, the highest in the country" (Gibson, p. 11). This increase in working hours not only corresponded to a decrease in time available to meet other needs, (including acquiring additional education), but indicates pressure on lower income Albertans who experienced reduced access to the job market. Vibrant Communities Edmonton found that many indicated that longer work hours or more than one job contributed to high levels of stress and left little time for other activities (Vibrant Communities Edmonton, 2007, p. 44).

Recession Means an Insecure Employment Environment

Since the economic recession beginning in November of 2008, data over the last year reveals the following trends:

- Substantial job losses have been entirely due to decreases in full-time, secure employment.
- Income losses generally affect low and middle income households more than wealthy ones.
- The recession reduced wealth significantly in Alberta.
- Based on previous recessions, the poverty rate will likely increase by the same number of percentage points as the unemployment rate.

It will likely be many years before we return to pre-recession unemployment and poverty levels (CIW, 2009, p. 2).

Unemployment rates began to rise in December 2008 and have been rising ever since: "All regions in the province show rising joblessness, with Calgary's unemployment rate more than double what it was a year ago. In general, rates are higher in northern Alberta, while in the south, the unemployment rate in the Lethbridge/Medicine Hat [area] has risen only slightly – from 4.4% in April 2008 to 5.3% in April, 2009" (AFL, 2009, p. 9).

Yet, the still modest unemployment numbers, lower than the national average, conceal a serious reality, as thousands of full-time jobs are replaced by part-time work. "Over the last twelve months, the number of Albertans in full-time positions has fallen by 56,500 (a drop of 3.3%), while part-time jobs have increased by 42,200 (a whopping 13.4% increase)" (AFL, 2009, p. 9). In other words, not only has the recession driven many workers out of the workforce, it has also increased the proportion of workers in more unstable job categories (CIW, 2009, p. 4). One of the other reasons for the modest unemployment rates is that "many [temporary] foreign workers do not show up on the official figures, as often they are sent home when laid off, and therefore are not included in the statistics" or they stay but are restricted in their job search, deleting them from official tabulations (Byl & Foster, 2009, p. 25).

Increase in Low Wage Jobs

While the labour market is performing well in terms of generating a large number of jobs, it is not performing nearly as well at generating higher paying jobs. Growth in earnings has lagged behind growth in the overall Edmonton economy. In fact, the relative share of GDP going to wages and salaries is decreasing over time. "Better-paying jobs in sectors such as engineering, computing sciences and the skilled trades are being created in about the same proportion as lower paying jobs in the retail trade and hospitality sectors" (Kolkman, 2007, p. 18). So while there is little evidence of job quality decline, the Edmonton labour market continues to be a highly unequal one. "The growing gap in market income distribution is evidence of an increasing divide between better paying and lower paying jobs in the Edmonton economy" (Kolkman, p. 18).

The Edmonton labour market – like the Canadian labour market – consists of a large number of low wage jobs, many of them in the service sector. Four of the five largest occupations in Edmonton by number of employees (retail salespeople, office clerks, food counter attendants and cashiers) have below average wages. Eighteen out of the top 27 occupations by number of employees had hourly wage rates below the Alberta average (Kolkman, 2007, p. 20). Low wage jobs have other characteristics that make employees and their families more vulnerable. These include: "lower levels of unionization; minimal or no employee benefits such as extended health, dental or disability coverage; and minimal or no pension plans" (Kolkman, p. i-ii). Vibrant Communities Edmonton found that families with no benefits and only minimum wage jobs had great concerns about health, dental and eye care costs as well as saving for retirement.

Family Income Losses

In Edmonton, the median market income in 1980 for all family types was $53,400. By 2005 it was $48,600, representing a 9% decrease.[11] The median market income for specific families, such as lone-parent families and single working age males and females is "lower today than in 1981; in some cases, dramatically lower. For example, the median market income of single males has dropped 20 per cent in the past twenty-five years" (Kolkman, 2007, p. 12).

Dynamics between Resident Workers, Newcomer Immigrant Workers, and Temporary Foreign Workers

The Temporary Foreign Worker Program (TFWP) in Alberta has continued to expand and shift in the past two years. Alberta outstrips other provinces in the use of foreign workers. In December 2008, there were 57,843 temporary foreign workers in Alberta, a 55% increase in one year, and a quadrupling of the program in five years. Alberta now brings in twice the number of foreign workers than permanent immigrants (Byl & Foster, 2009, p. 1). Thus, Byl and Foster assert that the TFWP, in its new form, is rapidly becoming an institutionalized part of Canada's and Alberta's labour force strategy. Within the Alberta context, employers see it as a preferred approach for addressing labour market imbalances, particularly in low-skilled occupations (p. 32).

Yet, this new approach has a negative impact on the populations who have traditionally occupied those jobs. Although figures from the last 6-8 months are not yet available, it is possible to identify emerging trends using anecdotal information: "The AFL has received a large volume of phone calls from permanent resident workers (i.e., citizens and naturalized immigrants) claiming to have been laid off or have had their hours reduced while foreign workers in their workplace continue to work full time" (Byl & Foster, 2009, p. 26).

Permanent immigration has stagnated, with fewer than 25,000 immigrants coming to Alberta last year from outside the country, only a few thousand higher than in 2004 (Byl & Foster, 2009, p. 7). Yet, Byl and Foster indicate, "It is safe to estimate that more than 30,000 low-skilled foreign workers were working in Alberta near the end of 2008 – three times higher than all TFWP workers back in 2003" and more than the total number of newcomer immigrants (p. 10). "Newcomers to Canada speak to the difficulty of having their foreign credentials recognized,

[11] Measured in 2005 constant dollars.

and the frustration of having to take second place to temporary workers being brought in from other countries to fill the labour shortage" (Kolkman, 2007, p. ii).

Many commentators are worried that Alberta is creating a permanent underclass of guest and migrant workers working in the worst jobs that are brought in to build provincial prosperity, similar to the situation with the guest-worker programs in Europe and in Canada's early history (Byl & Foster, 2009, p. 3). This will increase the polarization and segmentation of the labour market with a new class of worker that suppresses wages and working conditions, sparks racial tensions and deepens exploitation and exclusion (Byl & Foster, p. 32).

Increased Food Insecurity

There is a strong correlation between living in poverty and being food insecure. Economic changes reflected in employment opportunities, levels of wages and changes in housing costs play a primary role in explaining food insecurity. "The most recent Canadian Community Health Survey found that 47,800 Alberta families with children (11.7%) experienced either moderate or severe food insecurity. The survey found,"Almost one in eight families did not have access to sufficient, safe and nutritious food to meet their dietary needs and food preferences for an active and healthy life" (cited in Kolkman, 2008, p. 11). The Alberta Food Bank Network Association found that of the 38, 837 individuals served by food banks during the month of March 2007, 43% were children, a number that has remained fairly consistent since then. Over one in four food bank recipients (27%) reported having income from employment. In other words, Alberta has the highest rate of working poor requiring food assistance. Consistent with findings across Canada, many of these households report that they rent accommodation, their households have less than $15,000 annual income which is far below the poverty line, and that they regularly spend over 60% of their income on rent and utilities.

Achievement in learning does not necessarily protect one from poverty. It is often assumed that food bank clients have significantly lower levels of education compared to the population as a whole. While it is true that food bank participants are more likely to have less than a high school diploma, over one-third of food bank participants had some post-secondary education (Goldberg & Green, 2009, p. 13).

Most Vulnerable Populations

Aboriginal Peoples

One of the two groups that experience significantly higher than average unemployment are Aboriginal people, comprised of First Nations, Métis and Inuit. "The April joblessness rate for aboriginal people living off-reserve was 16.9%, more than double the rate of the previous year. This is persuasive evidence of the structural racism embedded in the Alberta labour market – aboriginals are almost always the last hired in good economic times and the first fired when recession hits" (AFL, 2009, p. 11). Kolkman (2007) adds, "They are disproportionately employed in low wage sectors such as retail trade, accommodation and food services, or work as low skilled construction labourers" (p. 8). The result is that Aboriginal children are more than twice as likely to live in poverty as other Alberta children. Yet, this data still excludes First Nations children living on-reserve who are not counted in low income surveys (Kolkman, 2008, p. 1). Nevertheless, poverty rates for young First Nations children living off-reserve are three times higher (45%).

These realities will continue to escalate as the Aboriginal population is growing faster and is much younger than the non-Aboriginal population. In 2006, Alberta's Aboriginal population increased 17.1% from five years earlier. This is about twice the rate of growth of the overall Alberta population. In 2006, the median age of Albertans was 36 years, compared to a median age of 25 years for the Aboriginal population. The median age of Aboriginals living on First Nations reserves is even younger at 21 years. Some Alberta First Nations reserves have a median age below 18 years, which means that the majority of their residents are children and youth. Racism and residential schools are a legacy Aboriginal people are still struggling to overcome. Aboriginal people face key barriers to employment and do not have the same opportunities to participate in the labour force as other Albertans.

Newcomer Immigrant and Refugee Populations

"Recent immigrant and visible minority families experience higher unemployment rates placing them at greater risk of living in low income" (Kolkman, 2008, p. 1). Newcomers to Canada face negative attitudes from others or frustrating problems that affect their ability to support themselves and participate fully in Canadian society. Issues include:

- Taking second place to temporary workers being brought in from other countries to fill the labour shortage
- As a qualified professional, having to endure prolonged and often difficult process to receive Alberta accreditation
- Not being able to find a job without speaking English and not being able to support a family without a job
- Facing discrimination by employers and landlords, especially when not aware of their rights
- Being forced into low-skill, low-paying jobs despite high levels of training and skills
- Having to wait too long to bring in sponsored spouses and family
- Not getting assistance with the sponsorship process and finding immigration lawyers too expensive
- Not knowing how to find housing and negotiate a rate as prices rise
  (Vibrant Communities Edmonton, 2007, p. 44)

For skilled immigrants, complex regulatory systems and a lack of capacity among professional bodies and postsecondary institutions to assess foreign credentials are significant barriers to work and further learning (Ikura, 2007).

The Working Poor

"Working is still an effective way out of poverty. But for one out of three low income Albertans, working is not enough" (Kolkman, 2007, p. ii). There are widely held misconceptions about people working in low wage jobs, one of which is that they are mostly high school students living with their parents. While a number of these workers are youth, the average age of food and beverage servers and food counter attendants is far beyond high school at age 27. The average age of grocery clerks and cashiers is 28. According to Kolkman (2007), most workers in low wage occupations are mature adults who are likely to have family responsibilities. Without

well-paid, secure employment there are few opportunities for growth and education and many juggle several low-paying jobs to make ends meet.

Thus, job is no longer a ticket out of poverty for everyone. One out of every twelve children in Alberta lives below the Statistics Canada's low-income cut off (LICO After Tax) – 64,000 children. Approximately 49% of those children live in households where at least one parent is working full-time, all year round (PIA media release, Nov 2007). Despite working full-time, approximately 22% of all employed Albertans are earning less than $12/hour.The majority of low-wage workers (52%) are older than 24 years of age and 64% are women. These statistics also show that some cities in Alberta have a higher percentage of low-wage workers: Lethbridge (29%), Red Deer (24.7%) and Edmonton (22.9%) (PIA media release, Nov 2007). Further, "four out of five (78%) low income children in Alberta live in families where at least one parent works part-time or part of the year" rather than living on social assistance (Kolkman, 2008, p. 1). "Lone parents face particular challenges: almost two-thirds (65%) of low income children in Alberta live in lone parent households in which their parent works either full-time or part-time" (Kolkman, p. 1).

Young Adults

"Despite improved employment rates, young adults are still twice as likely to be unemployed as the rest of the population" (Kolkman, 2007, p. i). Their unemployment rate is also in the 7% range, double that of the rest of the population. They are also highly represented in the low wage sectors such as retail trade, accommodation and food services, or work as low skilled construction labourers.

Women

As one report described it, "Gender creates a cleavage of vulnerability that cuts across all other groups" (Townson, 2009, p. 5). While the groups most vulnerable to poverty are racialized groups, if gender is included the poverty rates across all the above groups are higher for women than men. Women's wages still lag far behind those of men. "In 2008, 82% of women in the age group 25 to 44 – the main child-bearing years – were in the paid work force. But women earned only 65.7% of the average earnings of men" (Townson, p. 6). There has been little improvement from 10 years earlier (1998) when women earned 62.8% of the average earnings of men. While these numbers include part-time workers, if only full-time work is examined women's earnings were just 71.4% of the average earnings of men (Townson, p. 6). While 10% of men are employed in low-wage occupations, 20% of women have low-wage work[12] with women accounting for 60% of all minimum wage workers (Townson, p. 6). Typically, it is argued that women choose to work part-time as a way to combine wage work with family care-giving. Yet, 27% of women in the main child-bearing years (aged 25 to 44) are working part-time because they can't find full-time work. Only 38% or women are working part-time because they are combining it with caring for children (Townson, p. 7).

These statistics manifest in the poverty levels of female-headed lone-parent families and females living alone, which are several times higher than the average for all family types. In 2005, 26.2% of families were headed by a woman in a low-income situation. "The low income

[12] Low wage is defined as earning less than two-thirds of the economy-wide median wage (Townson, 2007, p. 6).

rate was even higher for working age single females, at a staggering 42.8%" (Kolkman, 2007, p. 24).

Education and the Integrated Issue of Security

In sum, Alberta individuals and families are working long, hard hours to ensure that they have food, housing and income security. Education does not guarantee that poverty can be avoided and conversely, poverty ensures that many who desire to participate in educational programs are unable to do so. Studies have shown that family expenditure priorities are housing and utilities followed by food and childcare. Spending on medical/dental issues, clothing, and recreation/leisure are often deferred, illustrating that educational aspirations would likely be sidelined as well. This means that basic security – job security, housing security and food security – are pivotal conditions for Albertans to access learning. With a complex of factors such as a low wage economy, unstable employment, rising unemployment, high living costs, high inflation and low social assistance, Alberta's citizens do not have the basic security that would enable them to participate in learning opportunities, particularly using their own financial resources.

Policy Responses in Alberta

Many postsecondary institutions have responded to the needs of marginalized adult students by modifying admission requirements and recognizing prior learning. However, this system of admissions is inconsistent and its effects on subsequent participation are not well researched (Myers & deBrouker, 2006). A lack of central coordination of research and data collection on adult education participation makes it difficult for Canada to address regional disparities (CCL, 2007; PLA Centre, 2008). Myers and deBrouker (2006) state that despite many initiatives to support adult learning, "provincial adult learning systems remain complex, fragmented, and incomplete" (p. vi).

There is some recognition of these difficulties in Alberta's systematic efforts, in recent years, to reform and expand its systems of adult learning. While many of these policy initiatives have been focused on formal post-secondary institutions, the *Roles and Mandates Policy Framework* (2007) recognizes that policy efforts must also be focused on building bridges between and among formal and informal learning opportunities, and developing partnerships between grass-roots community-based education and post-secondary institutions (Alberta Advanced Education and Technology, 2007). The principles guiding the *Roles and Mandates Policy Framework* include goals of being accountable, collaborative and responsive with seamless transitions and sustainable/effective use of resources, while maintaining a standard of global excellence and quality.

Literacy Initiatives

The International Adult Literacy Survey found that inequalities in literacy are correlated with economic inequalities (Rubenson, 2007). Yet, 40% of Albertans aged 16 and older struggle with the ability to understand and use information from written texts (Alberta Advanced Education and Technology, 2009). Literacy goes beyond capacity with written text to, as Freire (2003/1973) describes it, capacity in "reading the word and the world" wherein citizens can use information effectively, understand and name their social context, act as advocates for

themselves and engage in the political system, as well as manage daily contexts and problem-solving requiring multiple literacies, i.e., financial, legal, health, parenting, technology and environmental literacy. Disturbingly, adult Albertans with adequate foundational literacy skills (above Level 3) has not increased since 1994 (Alberta Advanced Education and Technology, 2009, p. 2) Moreover, there is strong evidence of a link between literacy levels and social and civic engagement as well as economic rewards for both the individual and the society at large. In the document *Living Literacy: A Literacy Framework for Alberta's Next Generation Economy* (2009), the Alberta government lays out a framework for coordinating literacy programming across multiple stakeholders in an effort to improve literacy gains.

Essential Skills and Vocational Training

A Learning Alberta emphasizes the importance of "foundational learning," defined as "learning opportunities and supports required to attain and maintain foundational skill or competencies that enable individuals to participate socially, pursue further learning, and have satisfying employment" (Alberta Advanced Education, 2006b, p. 5). Foundational skills are not only used in the workplace. Foundational skills are also needed for self-advocacy, such as the abilities to "express ideas and opinions with... confidence," and to "solve problems and make decisions without having to rely on others to mediate" (Alberta Advanced Education, 2006b, p. 7). Foundational skills are also critical to one's motivation to pursue further learning.

Programs focusing on low-skilled workers with tenuous or no labour market attachment tend to focus on essential skills. However, the OECD (2005) found that a highly personalized approach combining counselling, training and deliberate strategies to enhance networking (social capital) can be effective with disconnected and disengaged adults. This can build essential skills and help to transition adults into vocational training.

Prior Learning Assessment and Recognition

Among the most significant institutional barriers to accessing formal learning opportunities is the absence of a reliable and universal system for recognizing learning and experience gained outside of the formal education system (PLA Centre, 2008; Wurzburg, 2005). Increasing mobility among students and increasingly non-linear work and learning paths have increased the need to set standards of quality and recognition of prior learning (CCL, 2009; OECD, 2005). While innovations in prior learning assessment and portfolio-based evaluations are of interest to policy makers, post-secondary institutions and employers alike, they have been slow to recognize non-credentialed learning. The Prior Learning Assessment (PLA) Centre (2008) suggests that community organizations already working with "under-represented target groups" could form a "third sector" learning system focused on more flexible forms of adult education. The PLA Centre identifies three groups for whom prior learning recognition would be especially valuable: immigrants, people who have gained significant skills and knowledge in the workforce, and students or professionals transferring between institutions and/or provinces (p. 42). The OECD (2005) cautions, however, that alternative systems of knowledge and skills recognition must also be recognized and valued by employers if they are to be effective.

Theoretical Framework: Pierre Bourdieu's Forms of Capital

It is not often that contract research projects will utilize a theoretical framework in their work. However, this reduces the ability to fully conceptualize the data collected. Sometimes a psychological approach is used to understand the individual learner but this then discounts the larger forces that constrain an individual's choices. In this project, we used a theoretical framework to synthesize and analyze the literature reviews and the data gathered. For us, it was important to understand the broad context that have created the socio-economic conditions experienced by marginalized adults, as well as their lived realities and their learning histories. For this, we turned to theories of political economy from sociology. From sociology, we also drew on the concept of intersectionality – how people experience marginalization in more than one aspect of their lives whether by socio-economic status, gender, race, age and so forth. We were seeking to understand the dynamics of how multiple barriers might operate in an individual's life and in the society at large, creating inaccessibility to learning opportunities.

As we engaged in the data collection and the initial stages of analysis, it became clear to the research team that the theorizing of Pierre Bourdieu would be most helpful for framing our understanding of what we were learning from the participants. Bourdieu (b. 1930) is an important French sociologist who centered his theorizing on the role and power that education and other cultural factors have in a society. In particular, he developed some of his key concepts by examining the postsecondary education system in France. His primary contention was that the upper and upper middle classes not only have substantial *economic* power but that they use their *social* power to assist their children to succeed in the education system and to build the *cultural* power that reproduces their high socio-economic position from one generation to another. In this way, he studied the relationship between individuals and society through the medium of the education system.

Bourdieu (2001) discussed three kinds of capital – economic capital, social capital and cultural capital. *Economic capital* is self-explanatory; it is the command over economic resources. *Social capital* refers to the networks of influence, support and connections among privileged families that they can tap into by virtue of their social position. These networks provide the opportunities, information and resources that assist a family to ensure continuing economic success for their children. While Bourdieu developed this concept by studying wealthy families, the concept can be applied in a variety of contexts to refer to the social relationships that provide us with information, personal connections, referrals and influence in certain circles. These social relationships can be based on extended family, professional relationships or friendships. It can be argued that marginalized adults often lack access to this kind of capital that could support their learning aspirations as well as their economic goals.

One of Bourdieu's most interesting concepts is that of *cultural capital*. Cultural capital refers to the cultural knowledge and behaviours (or values and attitudes, perceptions, language and forms of knowledge) that make middle class and upper class families comfortable in the schooling environment. For instance, behaviours might include strategies for doing well in competitive exams, a value could be the belief that one succeeds or fails based on one's own individual merit, and language might include competence in formal language usage rather than slang. Bourdieu felt that lower income classes lacked this cultural capital (as well as economic and social capital) and that this was a factor in their lack of success in educational systems. He proposed that, rather than merely adapting to a system that has been shaped by higher income classes, lower income classes can learn to critique this system and make more informed choices about what they adopt and how they want to interact with this system.

FINDINGS FROM THE DATA

In this large section of the report, we review the findings on three themes: balancing goals, needs and capacities; lived realities and barriers to learning; and pedagogical approaches for marginalized adults. In each sub-section, we first identify the research framework and literature related to the theme, then the research questions and finally, we integrate quotes from the interview and focus group participants with statistics from the surveys to present the findings on each theme.

Balancing Goals, Needs and Capacities

The Research Framework for Studying Needs

Identifying the educational needs of marginalized adults in the City of Edmonton is the stated purpose of this research project. Therefore, we purposefully addressed this question in all three methods of collecting information (i.e., focus groups, interviews and surveys), thereby gathering a wealth of information on how marginalized adults conceptualized their "needs."

Conducting a formal needs assessment is often recommended for obtaining information about the needs of people who might access learning opportunities. However, as we began the research, we recognized that it was important to rethink the assumptions that are embedded in ideas about needs and consider some of the fallacies of needs assessments as an approach. Thus, we considered the following three questions.

What is the definition of the learner? Who is the learner? What is a low-income learner?

The first task in understanding the learning needs of low-income adults was to define the population whose needs we were attempting to determine. In the information letter provided to agencies and organizations, we identified the Low Income Cut-Off[13] as a guide for selecting participants for the interviews. However, we quickly learned that, not only income but also other forms of discrimination and life circumstances contribute to marginalization.

Embedded in questions of definition are issues of the power to determine who ought to be learners in society and who are constructed as learners and educators. This understanding is part of the expert model that suggests that some have the knowledge that others are lacking, and that this knowledge is uni-directionally transferred from one to the other through "education." (See for example Freire, [2003/1973] regarding the "banking model" of education.) We wanted to keep this in the forefront of our considerations, especially because we believe that all people are simultaneously learners and holders of knowledge.

Further, we considered the term "low-income learner" or "barriered learner" to convey two problematic assumptions: first, that learners are entirely responsible for their social class

[13] Statistics Canada established this measure in 1968 in order to identify the number of persons who were less well off than the majority. Currently, for a family of three living in Edmonton, the LICO is $26,095/year.

position in society and the barriers they face and second, that it is their responsibility to overcome them. We also considered the stigma that might accompany these terms.

Instead, for this report, we adopted the term "marginalized adults" to convey that participants may not construct themselves as "needing" learning and that, through little fault of their own, they are on the margins of society relative to garnering social benefits and sharing a sense of belonging. Instead, there may be multiple reasons for their marginality, including socio-economic class, gender, race or ethnicity, disability, age, sexual orientation and other forms of discrimination that are embedded in our society.

What are needs? Who has them?

The literature typically suggests that the purpose of a needs assessment is to gather evidence to verify a discrepancy or gap in the learner's present state compared to some desired state. However, consistent with critics of this view, we found that this is a deficiency model that is not very useful. Illich (1992) suggests that needs can convey, not only a deficit but also, stigma, inferiority, dependence and loss of autonomy. People with needs usually need some form of help to address those needs. However, Gronemeyer (1992) contends that "helping" is an exercise of power that often hides a paternalistic relationship between the helpers and those with needs. Further, when helping is institutionalized and professionalized, it can become an instrument of social control leading to assimilation, just as in the colonial systems of Aboriginal education in Canada.

Rather, during the project, we often heard more about goals, interests and even assets or capacities, than needs. Further, as we engaged with the participants, we recognized the interconnectedness, complexity and nuances of their so-called needs.

How do we find out about needs? How do we articulate these needs? Who decides?

Needs assessment literature usually refers to at least two kinds of needs: felt needs (identified by learners) and ascribed needs (usually attributed to learners by providers or other stakeholders). Cervero and Wilson (2006) suggest that it is problematic to focus solely on the felt needs of learners because this is likely to ignore other powerful interests that sometimes motivate learning programs. However, it is equally problematic to focus exclusively on ascribed needs because not all stakeholders are well connected to the lived realities of learners, and learners are not often motivated by what other people believe their needs to be. Ascribed needs can easily shift to become institutionally determined, prescribed needs. Furthermore, people themselves have the capacity to identify their learning goals, outside of what institutions and governments may construct as their learning needs.

It is quite common that the felt needs of service users and the needs ascribed by service providers are different and even contradictory. For example, in a recent adult learning needs assessment, LeMay (2004) found that key informants from service agencies identified parenting as a course that would be of most benefit to individuals and families whereas parenting was ranked eighth by adult learners.

Whether identified needs are felt or ascribed, Davidson (1995) cautions us against a common fallacy in assessing educational needs. He suggests needs are neither self-evident nor discovered but are constructed within a particular historical and political context. For example, that computer skills figure prominently in this needs assessment is, in part, a function of the

technological context of our time. That program staff worry about the shortsightedness of the single-minded focus on employment programming refers to present-day political and economic policies based on Human Capital Theory.[14]

This research privileges the voices of the learners themselves – marginalized adults who are not often reached in research projects. The community-based workers who are in closest contact with these adults in grassroots agencies and organizations provided supplementary information that demonstrated an astute understanding of the learning needs of their clients. In other words, the needs that marginalized adults identified in the interviews and surveys were mirrored in the comments of service providers who attended the focus groups. We did not consult other institutional stakeholders in this project.

The Research Questions about Needs

While recognizing these many limitations and contextual factors, in order to obtain information about their needs, we asked interview participants about their past, current and future learning activities, e.g., what they are learning, what they enjoy learning and what they would like to learn more about. In the focus groups, we asked participants to identify educational opportunities that would assist learners in addressing their challenges. Surveys included the following questions:

- In the past, what motivated you to participate in these classes, programs or activities?
- What are some of your reasons for wanting to participate in classes, programs or activities in the future?
- In the future, what kinds of classes, programs or activities would you like to participate in?

From the Data

In this section of the report, we first identify a vast array of learning interests and goals and then look at the complexity of learning needs in a discussion that integrates the findings.

Learning the Basics

The majority of participants were either already involved in or wanted to take courses to learn "the basics" such as:

- Reading, writing and numeracy
- Secondary math, science, English and social studies
- The General Equivalency Diploma (GED)
- English language learning (ESL)

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[14] Human Capital Theory "posits that education is a major means for increasing the value of people in the workplace" (Marsick & Watkins, 1990, p. 205).

Interview participants identified community-based programs as places that they could attend for basic education, in addition to NorQuest, NAIT and Grant MacEwan College (as well as a variety of similar institutions outside of Edmonton).

Several participants identified upgrading as an important step to achieving their career learning goals. For example, in the following quote, the participant describes the process of moving from upgrading to more specific vocational training at NorQuest College (formerly AVC) and then into training for a new vocation as a life skills coach.

> [I went back to AVC] because I only had Grade 10 and I wanted an education… I knew I had to look out for my future so I went to Alberta Vocational [College] and they accepted me and I got my Grade 12 there. Then after that, I started working and… I wanted to change my vocation. I wanted to learn more about computers, how to work in an office… So I took the computer office skills course at NorQuest… Right now, I'm doing extensive research on life skills coach – that opens up lots of doors as well… I've already been accepted to the Life Skills Coach Training Centre.

Similarly, another woman planned to go from pre-employment training at Wecan Cooperative to upgrading at Yellowhead Tribal College to the social work program at Grant MacEwan College.

Almost 20% (19.8%) of survey respondents identified literacy/upgrading as a program they would like to take in the future. A small number of adults surveyed had taken educational programs to learn English (6.6%) or thought they might take ESL classes in the future (3.8%). (However, this statistic should be used cautiously because only 10% of surveys were completed at the Millwoods Welcome Centre where we reached newcomer immigrants).

In sum, marginalized adults who participated in this study are interested in learning the basics, i.e., basic education, literacy and upgrading. From among the small group of immigrant participants, a handful are interested in language learning.

Computer Learning

Interview participants almost universally mentioned learning about computers and the internet for a plethora of purposes including: news, social networking, reading newspapers from one's homeland, doing school work, learning about interesting topics and learning new skills such as cooking, toilet training, and study skills. Many were self-taught although some learned computer skills as part of their other learning experiences.

One 46-year old woman who was contemplating enrolling in postsecondary education compares her earlier educational experiences to now:

> There was no internet… until, like, much later and that complicates things because I don't know too much about internet and stuff, how to use computers and stuff and software. Now, you have to know how to use that, so I'd have to learn how to use all that stuff too… I just know how to, you know, use the mouse and go on certain sites and stuff but I don't know how to use a printer and all that kind of stuff. We didn't have that… We went to the library and used encyclopedias, like we did it the old fashioned way.

For these adults, having access to a computer is not enough – learning to use computers with confidence is equally important. "I just want to learn how to use computers so that I'm not so scared." Others mentioned that computers are "a real necessity when students are going to school… As soon as I got a computer, my marks went right up. So it does make a difference." Skill and confidence on computers are also needed for employment purposes, as in the case of retail clerks.

Almost 40% (38.7%) of survey respondents wanted to learn computer skills.

In sum, learning computer skills is an important goal for employment, academic and personal reasons among marginalized adults.

Learning Life Skills

In the survey, 23.6% of respondents reported that, in the future, they would like to participate in a course on life skills and 15.1% on living skills/cooking. A number of items/skills are included under the concept of "life skills." One interview participant stated, "Life skills is: the more experience you have in life with things and you're able to handle difficult situations, the easier your job will be at working and dealing with difficult people." Another woman from the same pre-employment support program for women leaving abusive relationships is more far reaching in her definition:

> Just day-to-day things, you know, problems that come to your forefront, you know, like having to improvise, find information, networking. But just basically do one thing at a time, deal with it as it comes.

Life skills includes learning to "deal with things in my past," "dealing with crisis" learning "life management skills, surviving skills and learning about how to build my future." Life skills "keeps people thinking, you know, about school and stuff and they don't lose track of themselves. You stay on track with things."

Important to all the groups of participants is that life skills also includes building confidence and self-esteem. This was particularly noted in the focus group at E4C that was attended by a number of grassroots agencies that work with families before they are able to access more structured learning opportunities. One agency worker claims that her job is to help clients "fill their capacity" with the "good stuff that they know they're capable of doing [and] that they know they'll be successful [at doing]." And another suggests it is important to help people "become aware of how wise and intelligent they are."

With only slightly more women than men, approximately one-third of survey respondents took educational programs to feel better about themselves and more confident. The one person who self-identified as transgendered in the survey sample also thought this would be a good reason to participate in educational programs in the future. This motivational factor may also play a role for the 14.2% of respondents who identified an interest in educational programming related to assertiveness.

Motivation for participating in programs in the past	Female	Male	Transgen	Count	%
To feel better about myself/more confident	18	17	0	35	33.0%
Reason for participating in future programs	**Female**	**Male**	**Transgen**	**Count**	**%**
To feel better about myself/more confident	20	17	1	38	35.8%

Some examples of basic living/life skills identified by interview participants included learning how to navigate the city streets by reading street signs, how to read a map, how to drive a car and how to cook. According to agency workers, daily living skills such as working, cooking and language skills are also critical life skills. So, too, is discovering how they learn, relearning how to learn, how to build on what they know, how to ask for information, how to complete applications, how answer a question and how to reduce stress.

Not surprisingly, a number of participants identified concerns about money and thought that courses, books or internet resources might help them to manage their money better. Newly immigrated from India, one man who was interviewed reported having a library card within days of his arrival and taking out books on "how to stretch your dollar." One woman needed to learn how to make change so that she could manage in the grocery store more confidently. "I didn't comprehend how much money I was supposed to get back so I always thought that they were [ripping] me off." She added that it is important to learn what it means to live on your own in terms of finances and how to manage finances such as paying bills. Some even mentioned the importance of understanding the larger financial system such as world markets and trade.

Focus group participants concurred that it is important to learn skills for paying the rent and the bills, for keeping a balanced budget, for "how to *use* the loan money, not just how to pay it back," and learning how the system of financial aid works.

In the survey, 16% of respondents indicated that they had taken a program in the past in order to learn how to better manage money. However, a few more (26.4%) thought they would be motivated to take an educational program for this purpose in the future and 28.3% identified budgeting and money management as a course they would be interested in taking. Men and women are equally interested in learning about money management.

In sum, for the participants in this study, life skills is a broad term that encompasses an array of daily living and coping skills including money management and self esteem.

Learning to Enhance Social Relationships

As is apparent across the findings from this study, marginalized adults are very interested in enhancing their social relationships. Participants often identified an interest in improving communication with family members, being a better parent and learning about other cultures. They also recognized the importance of learning to use support systems.

An Aboriginal woman in a literacy program provided a very poignant example of how learning to write and to use the computer led to a family reunion.

> My famous life story is my background from where I grew up in [Canadian north]… and I found my sister in [the north] and I'm going to go up on the 17th to go see her… I wrote my book, because I was going to give it to the social services up there so they can give her a copy of it, and then she can find out stuff about me. I'm on Facebook on the computer, and I found my cousins, who know where she is in Yellowknife, because they've been talking to her, and apparently she's been asking questions about me, which I've been asking questions about her, so –

In another situation, a woman described learning how to *disconnect* from unhealthy relationships with family members and a man talked about learning interpersonal skills – "how to get on with people, how to not get on with people, how you come across… [and] how to work with people."

Focus group participants recognized that marginalized adults care about being good parents. "They have hopes and dreams for their kids… They want their kids to be happy; they want their kids to be healthy." Interview participants, both men and women, shared many examples of learning to be a better parent. As one woman said, "anything that makes me healthier as a person makes me a better mom" and another woman with six children explained "I don't have parents so I'm trying to learn about parenting." A couple of participants mentioned having trouble helping their children with homework because of their own difficulties in math or other subjects. One such woman who was registered in literacy classes recognized that she is learning *with* her three children when she takes them to different places like the zoo and Fort Edmonton Park "to learn more about different things… and let them see all the different cultures back then." One man wanted to learn patience, self-control and anger management in preparation for parenthood.

Some participants were required by Child Welfare to take parenting programs. One woman found that she was "getting good answers to my questions that I can't answer myself." A couple of parents mentioned special programs on Aboriginal parenting. A few parents had children with special needs. These parents used a variety of informal and non-formal strategies to learn about their son's or daughter's problems. According to one 27-year old mother who would like to learn more "about the human mind":

> Yeah, I would definitely take more courses to learn about my son's [attention and behaviour] problems… There's a parenting course and stuff I'd like to take. Like I get books form the library just so I can find out more about it. So, I'd like to understand it some more.

Some people liked the opportunity to learn with people from other cultures. One enjoyed the suppertime activities in the women's shelter when they "paired you up with a different culture" and they learned how to cook different foods. Another woman from Zimbabwe who described Canada as "pretty multicultural" liked "meeting people, learning about them and how they live, how they function too."

Learning to build social support systems was another need identified by interview participants. One formerly abused woman attending a pre-employment program at DECSA reported, "I could tell just the minute I walked in the door that it was the support system that I didn't have for the last four years." Sometimes this is the only or main reason for attending a program. Two people in their 40s explained that being around supportive people in their programs keeps them from using alcohol or drugs. One expanded, "I'm a recovering addict so it fills up the gap for part of the day… I hang out with my friend, my best friend. We walk around and we talk to people. We

hang out. We just have coffee together." This theme will be covered in greater depth in the section on pedagogy.

The tables below show statistics on a number of survey items that were related to learning for the purpose of improving social relationships.

Motivation for participating in programs in the past	Female	Male	Count	%
To improve my parenting skills	7	2	9	8.5%
To have better relationships	9	8	17	16.0%
Reason for participating in future programs	**Female**	**Male**	**Count**	**%**
To improve my parenting skills	10	6	16	15.1%
To have better relationships	12	13	25	23.6%

Types of future programs	Count	%
Parenting	8	7.5%
Caring for aging parents	6	5.7%
Anger management	16	15.1%
Communication skills	22	20.8%
Leadership skills	24	22.6%
Assertiveness	15	14.2%
Relationships/boundaries	21	19.8%

In sum, participants identified family relationships, parenting, cultural understanding and building support systems as important social learning needs.

Citizenship Learning

Several participants expressed interest in making the world a better place for everyone. This included pursuing career goals in the helping professions, political learning and standing up for your rights. Participants usually recognized that these learning goals/needs would be met in a classroom-based educational setting.

Typically related to one's own past experience, social work was frequently mentioned as a future career choice, although interview participants sometimes mentioned that learning activities such as training to work as a volunteer on a distress line might fulfill a similar learning goal. One 47-year old woman working on high school courses hoped to find the courage to attend NorQuest one day and then work with the elders in a nursing home. The following sentiment was common: "That's why I wanted to get into social working, so I can help people that are pretty much going through what I've gone through." Even though she knew it would take considerable time and patience, one participant wanted to become a lawyer specializing in First Nations law.

A number of participants acknowledged informal learning related to politics. History, and its relationship to politics, was generally of great interest to participants. Several Aboriginal interview participants reported an interest in learning more about their own Inuit, Métis and First Nations history, culture, "government issues" and politics. An Aboriginal woman explained, "It's just knowing where I come from, where my roots actually started from, is basically pretty much what everybody kind of wants to know, right?"

Another participant mentioned taking a variety of workshops in recent years "from gender workshops to political organizing." While working as a returning officer for two elections, one woman learned "a little bit about politics." Another woman thought it was important to learn about what's going on in the world such as wars and criminal cases. She identified herself as having a "sociological perspective [that] goes back to when I was in college and took sociology." Another thought that learning about government and the law, "stuff [that] really intrigues me," helped her to understand "the way things work around me." A 45-year old woman from the Philippines demonstrated a similar interest when she reported reading a book "about the history of the past, of the heroes and it showed… how [Filipinos] are being treated by those who come to the Philippines."

Workers in community-based agencies were concerned that marginalized adults learn how to be good advocates for themselves and their families. One provided the following example:

> We were pushing people towards having the ability to solve problems, the ability to access support and service from the system without things having to come to the point of a crisis. That if I was a family living in the Eastwood community and I had issues around food and nutrition, that I would understand who I would go to or what service was available to me and that I would have [the] advocacy to go out [and find it].

Almost equally divided between men and women, approximately one-fifth of survey respondents had been motivated to take educational programs in the past in order to be better able to stand up for their rights (17.9%) and/or thought it would be a good reason to take educational programs in the future (20.8%). For some respondents, wanting to take programs related to leadership (22.6%), public speaking (21.7%), communication skills (20.8%) and assertiveness (14.2%) might also be related to having better advocacy skills.

In sum, learning to be good citizens through their career choices, political learning and self-advocacy is important to many marginalized adults who are represented in this study.

Leisure and Cultural Activities

Everyone who was interviewed provided examples of things they had learned or wanted to learn that were interesting, enjoyable, fun or satisfying. These included: drawing, knitting/crocheting, cooking, roller blading, biking, tai chi, dancing, foreign languages, sports, fitness, photography, using wild plants and music. As part of her program at Wecan, one young woman had the "adventurous" experience of trying archery. An agency worker thought it was important that marginalized adults are able to take courses in yoga and meditation.

Frequently, participants learned leisure activities informally from other family members, friends or community members and some expected that their children would learn in this way as well. Many activities such as drumming, dance, hair braiding, traditional beading, basket weaving, learning Cree and daily yoga practice were connected to the cultural heritage of the

interview participants. A number of Aboriginal adults as well as people from India, the Philippines and Zimbabwe mentioned this fundamental relationship. From a Zimbabwean woman:

> I like stuff like painting and knitting, doing hair… grandma stuff. I started braiding when I was a little girl, and then the knitting and the sewing and the weaving baskets and what not. My grandma taught me that.

As is illustrated in the following table, a minority of survey respondents thought they would be interested in taking recreational or hobby courses in the future. Although the purpose for doing so is not evident in the survey, more than 20% were interested in learning about public speaking.

Types of future programs	Count	%
Public speaking	23	21.7%
Recreation/exercise	17	16.0%
Music	17	16.0%
Another language	17	16.0%
Carpentry/woodworking	15	14.2%
Gardening	12	11.3%

In sum, marginalized adults identify a strong interest in learning a great variety of leisure and cultural pursuits. Much of this is learned informally, although a number of participants also indicated having learned or being interested in learning leisure and cultural activities in educational courses or programs.

Learning New Skills and Subjects

A third of adults surveyed (32.1%) had taken educational programs in the past in order to learn a new skill and would do so in the future (36.8%). Some examples of new skills identified by interview participants were massage, getting a license to drive a motorcycle, first aid and house painting.

Participants also identified being interested in learning academic subjects such as a variety of social and physical sciences (e.g., history, geography, forensic science, nuclear physics). These interests were not always employment-driven. Often, participants suggested that such topics could be learned in a university or college although many found this information on their own. The survey did not have any questions related to academic subjects because we did not anticipate its significance.

Career Development and Employment

Interview participants identified a great variety of professional, paraprofessional and technical career goals that would require formal educational credentials from accredited schools, colleges or universities. In addition to the helping professions already mentioned, these included: legal assistant, electrical technician/engineer, business management, hairdressing, dentistry, chemical technologist, nursing, child care worker, electrician, media and accountant. One 19-

year old woman in a pre-employment program clearly described the interface between educational and career goals:

> For me, [hairdressing] is my passion so I should pursue it. Definitely, after this program, start hairdressing school. After hairdressing school, go to university or college, take business management and then just manage my own salon.

An Aboriginal male participant described a diverse trajectory of working and learning that covered cab driving, airport security, oil and gas field equipment operator and power engineering for which he had specialized training and/or credentials in each.

Newcomer immigrants typically hoped to enter programs that would help them regain their professional credentials, although some were working on a related career path that would require less education. For example, one 46-year old man has a degree in electrical engineering from a college in India. He is planning to register in a course at NAIT to obtain a diploma as an electrical technologist.

> The study which I did from back home, from my country, it is not valid. So again, have to study to match the Canadian standard… Basically, I will stick to my career… No matter initially if I feel trouble or feel some difficulties but then– I'm planning for long goals – after finishing this much studies, I will get good job.

One 59-year old woman from Chile would like to improve her English skills so as to be able to study to become a legal assistant. Although, if she "won the lottery one day," she said she would prefer to become a lawyer "for my own pride and my own satisfaction to be a professional in Canada."

A few participants mentioned "career planning" activities such as learning to write resumes and cover letters, job search skills and interview skills. One woman wanted to learn math and spelling so that she could confidently work in a shoe store with the computerized till and another knew that she had "to work very hard on my math" to become an electrician.

Finding a job was a motivating factor for one-quarter (25.5%) of survey respondents taking educational programs in the past and in the future. However, the number of survey respondents who were motivated to take educational programs in order to find a *better* job doubled from 16% in the past to 31.1% for the future. Almost 40% (36.8%) of respondents planned to take courses to aid in their career advancement in the future. In both the past and the future, men were more motivated to take courses to find a job whereas women were more interested in finding a better job. Sixteen percent (16%) of total respondents wanted to take courses related to job search skills.

Motivation for participating in programs in the past	Female	Male	Count	%
To find a job	7	20	27	25.5%
To find a better job	10	7	17	16.0%
Reason for participating in future programs	**Female**	**Male**	**Count**	**%**
To find a job	10	17	27	25.5%
To find a better job	20	13	33	31.1%

Types of future programs	Count	%
Career advancement	39	36.8%
Job search skills	17	16.0%

In sum, employment and career related interests are evident among marginalized adults. These include gaining job search skills as well as working towards longer term career goals.

Discussion of Findings

Policy tends to focus on individuals as rational, economic actors who regard learning as an investment in their future labour market prospects (see Rubenson, 2007). Critics note, however, that this instrumental perspective does not capture the complexity of individual motivations to pursue learning (Askham, 2008; Crossan, Field, Gallagher & Merrill, 2003; Reay, 2003; Redmond, 2006). Often, economic goals and personal developmental goals are inseparable.

The learning topics listed in the previous section demonstrate the range and variety of learning interests and goals uncovered in this study. However, what are not apparent in a list of discreet topics, are the interconnections and complexity of the needs of marginalized adults. Our findings unravel a layer of understanding about needs that is woven within and between the specific learning interests and goals described above.

Marginalized adults typically face formidable obstacles in being able to access learning opportunities that, in turn, make it difficult for providers to meet learner needs and effectively fill identified gaps. As we discovered, however, this does not mean that adults facing barriers are not learning. Livingstone and Scholtz (2006), for example, present evidence from large scale Canadian surveys that adult learners are widely engaged in informal and experiential learning that is largely unrecognized.

Thus, the first significant finding is that adults who are on the margins of society are highly motivated to learn and have an impressive range of learning interests and goals of their own. Rather than being "needs" oriented, they are goal-directed, demonstrating goals that are multi-faceted and multi-dimensional. They express a wide range of academic, recreational, cultural and relationship goals that might be found in any cross section of the population. A sentiment shared by the participants is one of wanting to learn just about everything.

Moreover, marginalized adults are already reaching some of their learning goals through numerous informal and non-formal learning opportunities that are more accessible and welcoming. They have already developed numerous learning strategies such as experimenting with computers, signing up for a parenting course, learning cultural craftwork from their families, and searching the internet for world news. Many newcomer immigrants are already successful learners having earned degrees in their home country. They demonstrate tremendous determination to re-qualify for their professional credentials. Career goals of marginalized adults span a broad range that includes law, engineering, nursing, childcare, hairdressing, accounting, social work and dentistry.

More importantly, marginalized adults are not fixated on learning for employment purposes or only on learning to negotiate the basics of daily life such as money management and navigating an information society. While these are important areas of learning, marginalized adults also express a wide range of learning interests that transcend immediate needs, including history, sociology, geography, forensics, cultural roots, public speaking, leadership skills, political education and citizenship skills. This finding challenges the belief based on Maslow's Hierarchy of Needs that marginalized learners who face homeless, joblessness and other signifiers of poverty are not capable or available for learning beyond their basic needs.

The second significant finding is that, in order to participate in learning opportunities, some additional learning capacities are needed alongside the determination, goals and strengths that marginalized adults already possess. As one participant said, we need to give people a sense of empowerment first.

For some to even enter a learning program would require basic literacy skills and upgrading that might enable them to transition into other programs and eventually ladder into career preparation. It is also apparent that specific competencies are building blocks for a successful learning career, such as computer skills and information processing skills as well as life skills that help to build a stable life infrastructure – from budgeting to cooking to job search skills.

The combination of basic education and specific learning competencies contribute to the *cultural capital* that is necessary for embarking on a learning journey. Together, these elements help build confidence and identities as well as skills as successful learners. Summarizing the comments of her fellow focus group participants on this topic, one agency worker said, "I look at education as a solution [but] if we don't look at what the person needs to put in place for the person to access the education then it becomes a band aid."

In addition, the desire to build community and strong social relationships is a critical element in understanding the needs of marginalized adults. Finding a support network, learning communication skills, successfully dealing with diverse people and situations, and learning how to address interpersonal situations such as managing their children's disabilities, withdrawing from destructive relationships and forging new supportive relationships all build *social capital* – the networks and social supports needed to be successful in a learning program, what one agency worker called the "wider concept of community-raising."

As well, many who have experienced dark moments and difficult situations want to assist others facing similar situations. So, despite sometimes dire personal circumstances, they exhibit a sense of giving and caring for others and of wanting to build a better society.

Another significant finding is that, although marginalized adults are often clear on their learning goals, they don't always know how to achieve them. Furthermore, as will be discussed in the next section, their goals are often hijacked by a complexity of dispositional, institutional, situational and structural barriers.

Lived Realities and Barriers to Learning

The Research Framework for Studying Barriers

Adult education providers and researchers have long been interested in identifying who participates in adult learning opportunities. Later, with growing concern about marginalized groups, concern grew about who *doesn't* participate in learning opportunities. Early research on this question introduced the notion of barriers to explain non-participation. Based on her review of the literature Cross (1981) was the first to systematically categorize types of barriers. She identified three main categories of barriers – dispositional, situational and institutional – that have since been used by many others.

However, according to Merriam and Caffarella (1991), "If one looks at the social structure rather than individual needs and interests, one discovers some very different explanations as to why adults do or do not participate in adult learning activities" (p. 94). In 2001, Conrad shifted the emphasis away from individual and local factors to introduce a more systemic and sociological perspective that focuses attention on the social structures that make up society. In proposing that we go "beyond barriers" in our thinking about access, Conrad writes:

> There are larger and more pervasive considerations about issues of access that look beyond learners' immediate financial or daily situations to their positions in society's social structure. Such perspectives are based on sociological doctrines and philosophies that seek to understand the relationship of individuals to their society and offer explanations of broad structural factors that inhibit certain individuals' participation in adult education. (p. 210)

She concludes the chapter by observing, "the question of who chooses to access and who is able to access education is still an issue that deserves society's scrutiny" (p. 212).

In 2006, Alberta Advanced Education presented the findings of an extensive review of the province's postsecondary education system (Alberta Advanced Education, 2006a). The report, *A Learning Alberta*, identified, "While Alberta has one of the best learning systems in the world, certain populations... remain underrepresented in their ability to participate and benefit from formal and informal learning" (p. 1). Key focus areas identified by Alberta Advanced Education and Technology include supports for persons with disabilities and immigrants, access for rural and Northern Albertans, and First Nations education. While each of these target populations has distinct concerns and needs, they do share a tendency to have common, multiple barriers to learning – specifically the negative effects of poverty and lack of prior experience and/or engagement with the Alberta system of education.

Using Conrad's (2001) framework for our analysis, we examined numerous situational barriers, dispositional barriers, institutional barriers and structural barriers, as well as the intersections between them, that impact access to learning.

The Research Questions about Barriers

To uncover these various kinds of barriers, we prompted interview participants with the following general questions:

- What things make it difficult for you to learn these things?
- What things make it difficult to participate in learning activities?

We also asked them to identify their preferred methods and places of learning and we considered how this might impact their access to learning opportunities.

In the focus groups, participants spent considerable time responding to three questions that touched on barriers. These were:

- How would you define a "low-income adult learner"?
- What are the particular challenges faced by low-income adults in the Edmonton region at this time?
- What are the particular challenges in reaching low-income adults regarding learning opportunities?

Information on barriers from the interview and focus group participants then contributed to the items identified on the survey. Half the survey respondents (49%) indicated that they encountered difficulties or barriers when participating in, or trying to participate in, learning programs/activities. They also identified a number of items on a list following the question: What kinds of difficulties or barriers have you encountered when participating in, or trying to participate in learning programs/activities?

From the Data

We begin each sub-section that follows with the definition of the barrier that is commonly used in the literature. We then summarize our findings relative to barriers and present a discussion based on our interpretation of these findings.

Dispositional Barriers

Standard definition: Dispositional barriers as those that are "concerned with the learner's attitude towards self and towards learning" (Conrad, 2001, p. 209). Cross (1981) included beliefs, attitudes, values and perceptions that inhibit learning. Merriam and Darkenwald (1982) sub-divided dispositional barriers into "psychological" and informational.

A key barrier to learning participation is that many do not consider themselves "learners" in the first place (PLA Centre, 2008). People with low education participation also tend to have had negative learning experiences in the past (Alberta Advanced Education, 2005; Illeris, 2006; Myers & deBrouker, 2006). Experiencing failure in compulsory education leads to incompletion and very often, disengagement from any subsequent learning. Disaffected learners still struggle to overcome associations with past, negative learning experiences, even when learning is offered in settings deliberately crafted to be as un-"school-like" as possible (Illeris, 2006).

For many non-traditional students, particularly those who have been away from school for a long time and/or have no post-secondary experience, formal education can be an intimidating and even alienating experience (Askham, 2008; Reay, 2003).

During the interviews, participants shared their perceptions about learning and education and about themselves as learners. Insights from focus group participants closely paralleled the messages from learners. Some items on the surveys provided similar information.

Based on our analysis of the findings from all three sources, we grouped dispositional barriers into two themes:

- Fear, discouragement and lack of confidence
- Negative messages affecting self-esteem and identity

Fear and Discouragement

Many interview participants talked about fear – fear of the unknown, of not knowing and of failure. "It's just that over the years, I've just let my fear get to me," reflected one woman. Participants often felt a general lack of confidence related to learning and some reported feelings of shame, discouragement, isolation, anxiety and depression around their learning experiences. Focus group participants perceived in their clients feelings of shame related to being illiterate and poor. One Aboriginal woman said that her shyness, depression and anxiety problems "keep me from being out and about learning more, which I would like to be doing." She found her first attempt at university to be very lonely and surmised that "if I had been less shy, it wouldn't have been as bad because I would have had people to, you know, go and talk to." She hopes that she'll "get the guts up to apply again next year."

Sometimes participants felt that there was no point in trying to connect with educational opportunities. A 65-year old woman surmised, "When you are at home and you are told so many times that you are no good and you're stupid, you just get to the point where you just don't want to do anything." Another older woman expressed her deep discouragement that her previous education doesn't count for anything in Canada.

> No matter how hard you try, it doesn't matter. It's not worth anything if you don't have experience. They even require experience if you want to wash dishes here in Canada. And it doesn't matter if you have a high school education or a university education. That's never been taken into consideration… If you don't have experience here in Canada in whichever line of work, there's no chances… everything just ends.

Some also talked about "readiness" – about being personally ready or not ready to engage in learning opportunities at different points in their lives. One woman who had attended the same literacy program for fifteen years reported that she wanted to go to NorQuest but, she explained, "there's a wall that is stopping me from going. I'm just too scared to go down there… There's a wall that's stuck right in the middle and I can't go anywhere… [It's] fear that I can't do anything."

Some older adults thought that they were told old to learn. One elderly (86-year old) Chilean woman believed that she had "messed up" her learning and now her age made it too difficult. Another woman from Chile, facing challenges getting work despite her educational credentials,

said, “You’re not twenty or thirty years old anymore… At this age [59], you start playing with time, with your age.” Within Aboriginal communities, many seniors “have never been to school so they don’t see the value in it because it has never helped them,” observed a focus group participant.

Survey respondents identified similar affective responses to learning situations. While slightly more than 10% (11.3%) experienced a lack of confidence, almost 20% (17.9%) felt intimidated or nervous about participating in learning activities. Slightly more women than men identified feeling intimidated or nervous but men were much more likely to report confidence and feeling stressed in group situations as barriers to learning.

Types of barriers and difficulties encountered	Female	Male	Count	%
Feeling intimidated or nervous	11	8	19	17.9%
Lack of confidence	4	8	12	11.3%
Find groups stressful	1	7	8	7.5%

Thus, fear, personal readiness, age and low confidence sometimes acted as barriers to accessing educational opportunities.

Negative Messages Affecting Self-esteem and Identity

Interview participants reported several examples of how negative messages from others affected their self-esteem and identity related to learning. Many began to develop an identity as failures through their learning experiences. One woman whose peers and cousins teased her and called her “stupid” in school said, “If you hear it so much then you just lower your standard of doing things.” Later, she had the idea that she might want to become a nurse or a day care person but “they’d always say ‘no, you can’t do stuff like that.’”

Consistent with Conrad (and the participant quoted above), we found that dispositional barriers were “usually associated with negative experiences in the learner’s educational past” (p. 109). These previous experiences, typically associated with schooling in childhood and adolescence, planted seeds of doubt, fear and lack of confidence in one’s ability to learn. A 32-year old Aboriginal woman who dropped out of school rather than repeat Grade 7 felt humiliated and “left behind.” In his first year of university, another participant was disheartened by the competitive atmosphere, and another became discouraged by her low marks (before she got a computer) while attending a program at NorQuest and “almost felt like quitting.”

In some cases, learners faced difficulties learning in inflexible educational environments that didn’t take their needs into account. Focus group participants often voiced their contention that the education system had failed these learners. As one explained:

> The [educational] structure failed them and so now here they are as adults with some similar kinds of challenges that they would have faced when they were young – inappropriate systems, other sorts of contextual issues that are problematic for them... We need to pay attention in terms of trying to redress some of [those] problems.

Some participants described learning situations that were permeated with racism and/or abuse. One 65-year old woman remembers earlier times when teachers would "stand you in the corner, strap you… [and] hit the desks if they thought you were day dreaming." One Aboriginal woman was sexually abused by her math teacher in school, another struggled for many years because people were "always putting down Natives.'" In school, a gym teacher was "calling me stupid and I'm just a Native and I can't do anything." Yet another Aboriginal woman attributed her mental illness to her experience in residential schools. A young woman from a visible minority became depressed when she was left out by the other students at her new school.

Focus group participants agreed that negative early learning experiences make it difficult for adults to re-enter the educational system. Problematizing educational opportunities as "gifts," one focus group participant said, "The first time you went through the educational system, as a young student, you weren't successful and it didn't feel good for you. So, for you, you look at the box that's [all] wrapped [up], and it not a gift, it's a root canal."

Among survey respondents, approximately 12% reported having past negative experiences and 7.5% reported facing negative attitudes toward adult learners that acted as barriers to accessing learning opportunities.

Types of barriers and difficulties encountered	Female	Male	Count	%
Past negative school experiences	7	5	12	12.3%
Negative attitudes toward adult learners	3	5	8	7.5%

Discussion of Dispositional Barriers

Across all the data, we found little evidence of barriers that could be entirely attributed to individual or psychological factors. While low-income adults *are* troubled by fear and discouragement related to learning, we recognized that these responses are manifestations of barriers that do not reside solely within the individual. Rather, lack of information, pessimistic messages about their learning ability and negative or traumatic learning experiences have contributed in significant and complex ways to their own feelings and identities as learners. Thus, the "learner's attitude towards self and towards learning" (Conrad, 2001, p. 209) is an outcome of social and institutional barriers and continues to interact with these other barriers.

In this we concur with Clayton (2000): "The patterns that emerge on analysis of participants suggest that wider cultural, social and economic factors play an important part in influencing and constraining personal choice… What appear to be dispositional barriers, then, may often be essentially institutional or situational, or a mixture of both which is hard to disentangle" (p. 6). We further argue that societal structures – in other words, the ways in which we organize our society as whole – are reflected in systems such as the education system that also play a role in learners' perceptions of themselves as learners.

Situational Barriers

Standard definition: Situational barriers are those that are related to an individual's particular circumstances (Cross, 1981). Time, money, childcare and transportation are cited most frequently in the literature.

Time and cost are consistently found to be the most significant situational barriers for adult learners (Baran, Bérubé, Roy & Salmon, 2000; Livingstone & Scholtz, 2006; Wurzburg, 2006). Often, lack of time amounts to competing demands on time as many adult students juggle their studies with work and family commitments (Reay, 2003) which contributes to educational interruptions (Goldrick-Rab, 2006; Holmes, 2005). Yet, lack of time spent on a physical campus may mean that students lose out on the affective supports of a learning community, increasing feelings of isolation (Spellman, 2007). Especially for adult students who have been removed from formal education for some time, time on campus is an opportunity to develop social capital that can be valuable in subsequent transitions to the labour market (Redmond, 2006; Walpole, 2003).

Time and money are of course interrelated, and the cost of education incorporates both direct costs (tuition, books, transportation, childcare) and opportunity costs (foregone labour market earnings) (Malatest & Associates, 2008; Wurzburg, 2005; Zhang & Palameta, 2006). It is well known that the private costs of post-secondary education in Canada have been increasing steadily since funding cutbacks to the system began in the 1990s. The intersecting effects of continuously rising tuition and cuts to student assistance have rendered the affordability of postsecondary education a significant issue (Canadian Federation of Students, 2009). Using 2002 figures, the Canadian Council on Learning (2009) states that 28% of adult Canadians wished to pursue learning but could not afford to. Cost may be a deterrent for students who do not live near a postsecondary institution(CCL, 2009), for low-income families and for adults who are living on their own and perhaps supporting dependents (Holmes, 2005; Malatest & Associates, 2008). Aversion to debt, particularly among newcomer immigrants, also appears to affect persistence in studies. As loan debt mounts, attrition increases (McElroy, 2005).

Age is also a determinant of participation in learning opportunities. Participation overall is high for young adults aged 16-25 and declines gradually over adulthood (Desjardins, Rubenson & Milana, 2006). Middle-aged adults participate most in employer-sponsored learning (Rubenson, 2006). However, disengaged youth and disengaged/displaced older adult workers are particular populations that require distinct strategies of engagement (Illeris, 2006). Perceiving that one's age is a barrier to labour market success may discourage older adults from pursuing education (Crossan, Field, Gallagher, & Merrill, 2003).

Our analysis of the information from the participants is consistent with a number of the findings in the literature. We organized the findings from the data into five main themes:

- Limited resources
- Parental responsibilities
- Lack of stability and support
- Learning problems, language skills, illness and disability
- Traumatic experiences
- Tipping points: snowballing of clustered barriers

The first four were artificially isolated from each other for explanatory purposes. In the last, we wove them back together into a more realistic portrayal of the complexity and precariousness of the life circumstances and social situations of marginalized learners.

Limited Resources

Some situational barriers are related to limited resources and are commonly recognized in the literature and by educational service providers, for example, childcare, transportation, money/income, multiple responsibilities and time. These situational barriers were also evident in this study.

Interview participants identified transportation as a barrier. Sometimes "you have to give up your transportation for a jug of milk for your kids," claims one participant. "So, basically you have to find what kind of programs you want to do closely [to] where you are so you can actually make it there or walk there." Particularly difficult for some parents was the challenge of getting multiple people to multiple places with no slack in the system for lateness or disruptions. An abused woman with two small children spent an hour going on the bus from her temporary accommodation in a hotel to a parenting centre until "I found out that I was pregnant again and I just stopped going because I was too tired to do anything."

There were numerous examples of marginalized adults juggling multiple responsibilities. Newcomers immigrants described the compounding challenges related to language, employment, retraining and learning about a new country. Managing multiple responsibilities limited the time available for marginalized adults to engage in formal and non-formal learning opportunities. One newcomer immigrant explained, "I want to learn a few things… to go for my studies. [But] here in Canada, your life is very busy. If you don't work hard, then you will not make money. But if you have to go to learning activities, you should have some spare time."

In the interviews, parents often mentioned challenges finding reliable childcare and managing the cost of childcare. Sometimes they brought babies or young children with them to their programs. A focus group participant highlighted the added difficulties that newcomer immigrants face when they don't speak English, don't have relatives to help with the children and don't have the finances to buy childcare services.

We specifically included a number of items on situational barriers in the survey and participants ranked four of these as the top barriers faced in accessing learning opportunities. At 32.1%, transportation was identified as the main barrier. Two other categories related to money were each selected by 26.4% of respondents and almost a quarter of respondents, one-third more women than men (15 and 10) identified a lack of time.

Relatively few respondents identified childcare as an issue and it was identified more by men than women (5 and 3). Two men and one woman identified elder care as a potential barrier and 11 respondents (5 men and 6 women) felt constrained by multiple responsibilities.

Types of barriers and difficulties encountered	Female	Male	Count	%
Transportation	18	15	34	32.1%
Too expensive	14	14	28	26.4%
Not enough funding	14	14	28	26.4%
A lack of time	15	10	25	23.6%
Multiple responsibilities	6	5	11	10.4%
Child care issues	3	5	8	7.5%
Elder care issues	1	2	3	2.8%

Thus, similar to other needs assessments, we also noted issues related to limited resources such as childcare, transportation and multiple responsibilities.

Parental Responsibilities

Beyond childcare, interview participants reported a number of issues and barriers related to parental responsibilities, particularly parenting in the early years. How these intersect with learning and education are covered here. As one 27-year old mother explained:

> The reason why I didn't finish [high school] was because my first son was just a baby and I didn't want to be working and taking night courses at the same time so I guess the kids would be the biggest barrier to everything.

Not surprisingly, it was more difficult to manage parental responsibilities when participants had little or no support. One woman, who finished Grade 8 and then had her first child, now finds that she needs to "learn to read and write all over again." But with five children, when her husband was in jail, she had additional childcare responsibilities, less income and was also pregnant. Therefore, to her, going to school seemed out of the question. Even when she found childcare and started a program at DECSA, she found it hard to work at home because "my kids are just a big distraction." Another mentioned having to quit school when she had to move in order to prevent her ex-husband from taking her children away.

Without support from her husband, another woman was already finding it hard to manage the childcare responsibilities and costs that were needed in order to study for a profession, but had to quit when her child got sick. A single parent of three with limited family support, described the escalating toll on her as each new parenting stressor was layered into her life.

> After I had my son… I went to school at NorQuest in September, like right after. It took a toll. Like, I did the first semester because I have three kids right and they're pretty much three years apart. And [at that time] I was by myself. It was really taking a toll on the stress level. My oldest daughter went to school and then one of my friends kept her after school. My two other kids went to daycare. It was pretty hard. It was really stressful and my son got sick a lot… It's more or less like life itself is throwing this and that at me.

As is evident in the preceding quotes, dealing with sick children was a common reality for interview participants. One 21-year old Aboriginal man related that the extra money needed to pay the medical bills for his sick baby affected his ability to continue in his apprenticeship

program. Participants also had children with hydrocephaly, Attention Deficit Disorder and behavioural disorders.

An elderly woman recalled her hectic years after arriving in Canada, raising nine children, working because they needed the income and then being widowed, leaving her no opportunity to attend formal schooling. Another worked long evening hours in bars and nightclubs and looked after her young children during the day.

As the participants clearly demonstrated, parental responsibilities go well beyond the more commonly recognized barrier of childcare. Single parenting, sick children, limited support for parenting, early parenthood, costs of childrearing – usually occurring in tandem – all contributed to educational access issues for many marginalized adults.

Lack of Stability and Support

Some interview participants described insecure life circumstances that disrupted their learning trajectories, including lack of stable housing and support.

One woman provided an example of lack of stability during her school years that affected her learning.

> I went from school to school a lot from having to move and stuff. So, I think that had a lot to do with [my learning difficulties]. But basically, [they] kept pushing me aside, like you know, and every school was different. That was another hard part about it. Like, you go learning at that one school for three or four months or whatever and end up having to move sometimes and then go to another school and their activities were totally the opposite.

Occasionally, interview participants mentioned concern about the cost of housing such as this newcomer immigrant who noted, "At the same time, hard to rent the house and then all living expenses."

Lack of safe and stable housing was often an issue for women leaving abusive relationships and for youth living on their own. With two small children and pregnant, one woman went from a shelter to a hotel with bed bugs before she was able to get subsidized housing, and then only after "phoning them off the hook every day, three or four times a day" and going into the office to complain. In her younger years, another woman couldn't get into a program because "well, basically, I was single and 18 years old and I didn't have a stable place to live… and I didn't have family here at the time."

Very frequently, participants mentioned lack of support as factors that affected learning and education. Interview participants often felt unsupported by family and others who had an influence on their educational histories. One woman reported having no support system while she struggled in abusive relationships. Others, while away from their familiar support systems in order to attend educational institutions in the city, felt isolated and alone. One woman who had been on her own since age 12 felt that the lack family members to help with her children had prevented her from pursuing her educational goals.

On the survey, we asked respondents to identify whether "not enough support" was a barrier to participating in educational opportunities. Almost one-fifth (17%) of respondents, eight women and ten men, agreed that it was.

In sum, lack of stability and support make it difficult for marginalized adults to access formal and non-formal opportunities for learning.

Learning Problems, Language Skills, Illness and Disabilities

Various kinds of concerns related to learning problems, language skills, illness or disabilities affected some participants' access to educational opportunities.

Many participants said they had problems learning in school. However, many of these problems seemed related to other situational factors such as those covered here. Focus group participants often noted poor literacy levels among their clients and recognized the relationship of literacy to English language learning. Newcomer immigrants reported that their English language skills were impeding their advancement in Canada.

A small number of interview participants identified physical disabilities that affected their learning, e.g., hearing and vision. A participant who struggles with "circulation problems" so severe that they have curtailed her educational and employment opportunities asserts, "personal things in people's lives can really affect them because your mental health is really attached to your physical health. I think that's why I have circulation problems is I have too many things on my plate." After her diagnosis, she had to give up her job and was "forced" to go to NorQuest by Social Services in order to re-train for a new career. However, she still has not been able to find work.

Mental health issues and addictions were much more commonly mentioned during the interviews. Some participants reported struggling with mental health issues such as depression, anxiety, bipolar disorder and schizophrenia. Being a visible minority and starting a new school in Grade 12, was a depressing and isolating experience for one participant who "just gave up on life" for a time.

Several participants identified harmful drug or alcohol use, oftentimes during stressful times such as the death of a family member. One man, new to undergraduate campus life and to the city, described how "partying" took over and he didn't finish his engineering program:

> I kind of ran into a bump. It's the first time off reserve and in a big city. I never drank or smoked anything before then. Then, when I got to the university, I was away from my whole family and mom and dad's watchful eye and my bad influence buddies, as I like to call them, they all kind of introduced me to partying. So, I got to drinking in the bars on weekends and then that interfered with my marks… So basically, the partying caused low marks which caused me to be required to withdraw.

A 47-year old male attributed the thirty years of alcohol abuse that almost killed him to "the stigma" of being Aboriginal and the grief of numerous traumatic family deaths. "I just wanted the pain to stop, you know, and drown myself in alcohol, and I escaped for a long time because that's all I knew…. I just wanted to forget who I was."

As indicated in the following table, between 5 and 12% of survey respondents identified these types of situational barriers.

Types of barriers and difficulties encountered	Female	Male	Count	%
Physical health concerns/disability	4	9	13	12.3%
Learning difficulties	3	7	10	9.4%
Mental health concerns	1	6	7	6.6%
Inadequate language skills	3	5	8	7.5%
Difficulties reading and writing	2	4	6	5.7%

In sum, marginalized adults faced a number of barriers related to learning problems, language skills, illness and disability that were interwoven with other situational barriers.

Traumatic Experiences

Traumatic experiences such as loss, grief and abuse were often mentioned in the interviews. Each of these experiences had a deep impact on the participants' lives and learning.

Several interview participants had lost a close family member. One middle-aged male participant had lost his father, mother and sister – two of whom died in tragic circumstances (i.e., murder and heroin overdose). But most lacked the space to grieve and the resources to sustain them through the grieving and healing period. Sometimes death resulted in the loss of stability. The effect on education, career and life in general is poignantly described in the following quote.

> I ended up with honours – 80% plus. But the thing about that was I went through a really tough personal time near the end of the course. What happened was my mom passed away right after my grandma passed away, like within a day apart of each other. I was there in Vancouver [for the course] and mom was sick for a while and I really had no idea. All of a sudden, I get a phone call, "you better come home." And my Band fixed me up with an airplane ticket and a return ticket so I can prepare for the funeral. And while I was still kind of in a daze, bang, I'm back in Vancouver in class again and my whole life is like "what's going on here." I did finish that course but I lost total focus on everything I was doing up until then. In fact, I found myself still kind of trying to recover from that. Then, it was up to me to try to find work in Vancouver and that was really tough. In fact, nearly impossible… I was going through a deep funk and yeah, I guess I did turn onto booze again because I was so depressed… Drinking and not eating and not caring about anything. Eventually, like, I had no money for rent and I had to move back.

Although she, too, was a good student, another woman from a small rural community, quit school in Grade 10, in part, because her stepfather committed suicide. "It was really tough so I left. I quit school." Even though another participant had gotten help after a family death, she had a "nervous breakdown," quit school and then her grief "just got worse and worse over the years."

Several participants described abuse by intimate partners as well as by other family members. Some women were in abusive relationships that kept them homebound and away from learning opportunities because of control issues. One woman explained, "if I didn't finish that list [of chores] by the end of the day, I was getting hit… so I was trapped in my own home."

In sum, trauma such as loss and abuse left indelible footprints on the learning path of many marginalized adults.

Tipping points: Snowballing of Clustered Barriers

Typically, a number of these elements occured simultaneously obliging the person to try to cope with them as a package. Both interview and focus group participants were clear that this totality of challenging life circumstances was the everyday reality of most marginalized adults and, in fact, compounded their marginalization. It was equally clear that such a combination of stresses and strains on a person and a family can easily become overwhelming. One interview participant called this the "snowball effect" and a focus group participant referred to a cluster of barriers as a "hornet's nest." Another talked about the "spiralling cycle of all the different barriers that stack up against them."

Nonetheless, people generally manage until "one more thing" hits them. We called this the tipping point. Once faced with the "one more thing" – and it could be any additional stressor – the ability to cope is severely compromised and the person's internal and external resources are stretched to the breaking point. Little time or energy is left for anything beyond dealing with the crisis left in the wake of the tipping point.

There are countless examples of this in the interviews; some are already evident in the quotes inserted into the previous sections. Here, we include three additional examples. In the first, a 49-year old man who was homeless worried about the tipping point that would happen if he had to deal with one more issue while working on his recovery.

> My way of sobering up was going to detox. I have a mental illness. I'm bipolar and schizophrenic so I've been living with that for a long time. That's part of the residential school thing too because I wasn't born bipolar and schizophrenic. It just happened along the way. I don't question it. I'm trying to live sober [and] I try to take my regimen of pills everyday because, like, if I don't take them I might as well start drinking too. Because it gets to be that bad… I don't want to put too much on my plate at one time because failure doesn't sit well with me. I don't like failing at something. I don't like dropping things.

In the next example, a single mother with little support described the tipping point of a child's illness. She knew that staying home with a sick child would jeopardize her ability to remain in her pre-employment program. Many parents who were interviewed echoed this worry.

> You know, there are things that just pop up unnecessarily. I mean you cannot tell the future… I have three kids. I don't know if they're going to fall down and hurt themselves. I don't know if they're going to get really sick. I mean, some people don't have that support where they have like so many friends to come and take care of their kids, like other siblings or family to come in and help. In day care, if your kid has a runny nose or a little sign of a fever, you're not allowed to take them in there.

The final example from an interview participant demonstrates the complexity of coping with the intense workload in higher education while struggling with isolation and lack of support after leaving his close knit family and community on the Reserve.

> The workload was immense. I was taking like seven courses… I'd get like six hours of sleep a night burning the candle at both ends and, when I did get to class, it all moved so fast and it

> was really impersonal… You're just a number in a big crowd and really getting no support from them. [I worked hard] in the first year and I guess that's what was discouraging. After I got my marks on the first year after working so hard and it was so very tough, like I said, it was real competitive and I guess that just discouraged me a little bit. And then the booze and drugs just compounded that snowball effect.

A focus group participant complained that there is very little understanding about the complexity of managing several barriers simultaneously.

> You can look at data around literacy issues. You can look at data around the education levels of single moms. You can look at data around children raised in poverty. And you can isolate all of those things and try to figure it out from that perspective. [But] then if you begin to look at the bigger picture and families sometimes are compounded by six or seven of those factors, there isn't a lot of research that then says, "and so take ABCDE and F and put them together" and you know that this level of complexity – We just know our families are complicated and for some of them they function, although I don't know if they would articulate this, but they function at the level of survival

Given the challenging and precarious combination of life circumstances that marginalized adults are managing everyday, it is inevitable that tipping points will occur. In fact, participants' stories clearly indicated that, although the timing of them is unpredictable, their occurrence is highly predictable.

Discussion of Situational Barriers

As is already well known, marginalized adults are struggling with multiple responsibilities and restricted access to adequate childcare, transportation, money/income and time. In this study, we also uncovered more nuanced barriers related to challenging life circumstances and social situations including parental responsibilities, lack of stability and support, various learning issues and traumatic experiences that impact the learning experience.

However, the most important finding is not related to the *individual* elements but rather, how these elements *interact*. Participants alerted us to the critical significance of understanding their life stories and social circumstances holistically, including how limited resources, parental responsibilities, lack of stability and support, learning issues and traumatic experiences are compounded to create a substantial barrier to entering or to continuing in their educational programs.

Thus, marginalized adults are continuously coping with several interrelated stresses that tax their resource base. The coping system breaks down when "one more thing" happens and the tipping point is reached. Such situations require responses and supports that go well beyond the "individual's particular life circumstances."

Institutional Barriers

Standard definition: Institutional barriers "relate to policies and procedures of the institution that make participation difficult or impossible" (Percival cited in Conrad, 2001, p. 209). Course or program pre-requisites, for example, are a form of institutional barrier, as are educational policies or programs that systematically fail to meet the needs of certain populations.

For this study, we considered institutions to be larger organizations, often publicly funded, that provide formal learning opportunities for marginalized adults, usually for a credential. They include various postsecondary educational institutions such as vocational colleges, community colleges, universities as well as continuing education offered at school boards and extension programs at universities. Each institution has a different history and evolution within the postsecondary sector in Edmonton but they share features that distinguish them from community-based adult learning organizations, including stable operational funding, larger magnitude and variety of programming, larger enrolment, substantial infrastructure and a bureaucratically-organized administrative structure.

People who did not complete their secondary education, as well as immigrants and those for whom English is not their first language, are the most likely to lack the prerequisites, English language and literacy levels required to access post-secondary programs through traditional admission routes (Spellman, 2007). Further, as Holmes (2005) points out, for under-represented groups (First Nations students, parents and students with disabilities), a campus environment with weak supports can increase feelings of isolation and alienation. As "non-traditional" adult learners continue to seek formal learning opportunities, post-secondary institutions have responded with programming and administrative innovations to help barriered students transition into credentialed learning opportunities. Spellman (2007) notes, however, that the stigma of remedial courses and such programs can discourage learners from participating.

Based on their research, Malatest and Associates (2004) suggest that a number of institutional barriers for Aboriginal students can be resolved through several "exemplary practices for promoting and supporting Aboriginal post-secondary education" such as the following:

- Community delivery, such as offered through the teacher education programs
- Alternative admissions criteria and transitional support
- Academic and personal support, such as that offered [at] UBC's First Nations House of Learning
- Support for Aboriginal control of education, either at the program, curricular or institutional level. (p. 41)

Although the survey included little opportunity for respondents to provide information on institutional barriers, the interview and focus group participants contributed a wealth of information about two main areas:

- Insufficient flexibility and support
- Lack of information about learning opportunities

Insufficient Flexibility and Support

Participants reported that social, academic, financial and logistical inflexibility and support in educational institutions compromise their ability to access or to succeed in formal education.

As reported in the previous section on situational barriers, marginalized adults have complex life circumstances that are overwhelming and exhausting. However, institutions often fail to recognize the complexity of the life circumstances and the inevitability of the "tipping points"

faced by marginalized learners. Therefore, educational institutions do not always provide the necessary support and flexibility for those times (long or short) when students' resources are depleted and they are unable to continue to meet instructional requirements. Instead, institutions typically establish expectations for attendance and performance that are unrealistic and insensitive to these circumstances.

Assuming perhaps that motivation to attend and to perform may be enhanced by strict adherence to a common set of expectations, some programs employ learning contracts that outline, not only expectations, but also disciplinary actions. Marginalized learners, however, often perceive these as threats and punishments. For example, as mentioned earlier, parents are acutely aware of the untenable situation of being ousted from programs if they have to be home with sick children one too many times – the "three strikes thing," as one woman called it.

In the following quote, a woman in a pre-employment program illustrates the lack of flexibility in the system for people who are missing classes.

> Say they have a student that's constantly missing class, there could be something underlying. [Don't] pass judgment because you never know what somebody else is dealing with, you never know. And then you're stuck with a huge bill from the student finance and who knows the reason you're not coming, maybe because you're already broke… If somebody is struggling because, you know, their home life sucks maybe they can find some way of creating a program within the government that doesn't say "you're out, you owe us the money." That will give them a couple of months or until the next semester to sort their life out and try again and I know that there's nothing like that right now. If people don't make it to class or anything happens in their lives, they're booted out and you know they can't reapply. What if there's a mother out there, she's in school and something bad happens with one of her kids? She has to stop her schooling to take care of her child and she gets kicked out and she has to pay for all that money. She can't reapply for four years. There goes her dreams, right? They [should] want to empower people not to hold them back. You can't help what happens at home.

Inflexibility in pacing and scheduling make it difficult to adequately accommodate marginalized adults' life circumstances. A woman with six children had to get her children ready and to day care and school before going to class. "There are times that I don't even want to come to class because I'm just too late already." Another complained about policies that treated accumulated lates as an absence rather than providing support when mothers are unable to get to class and allowing them to do their schoolwork at home. Sometimes employment schedules interfere with regular attendance at educational programs. Marginalized adults with low incomes, who are often working in service jobs or unskilled labour, have little power to negotiate flexible work schedules around educational programs.

Similarly, interviewees reported an absence of educational counselling that considers the whole person with a mind toward success rather than as a weeding out process. Such counselling, according to the study participants, should be an ongoing process that begins before entering the program and continues throughout. One woman suggested that learners would be more successful in educational institutions, "if they were to take an optimistic approach with people coming through the doors and not be pessimistic and be supportive [instead]."

Class size is a point that will be addressed in greater detail in the section on pedagogical practices. However, it is raised here as well because it is sometimes an institutional policy issue.

Larger classes, without a sense of community and personal responsiveness, preclude educational success for marginalized learners. One Aboriginal woman "found the U of A horrible. It was too big and too lonely for me." A young man, "not a big fan of classroom learning," complained, "large classes make it hard for everyone to really get their needs met." In larger classes, he added, "people monopolize the space in a learning activity so maybe one person is taking up a lot of the chance to say something or chance to participate while other people are sitting passively by." Large classes also make it hard for learners to catch everything that's going on and individual assistance is not always available.

Inflexible funding structures also contribute to difficulty accessing formal education. For example, a 33-year old Aboriginal woman needed only $250 dollars to get started at NAIT. At the same time, her Band wouldn't fund her because she decided to switch from the big environment at the University to a smaller program at NAIT. In this case, funding structures at both NAIT and the Band colluded to prevent access.

> Well the biggest thing was the $250 deposit that they needed at NAIT, which I wasn't able to get, so I don't think I'm going to school. I got denied by my Band and then that two-fifty, for me, might as well have been a thousand because I just don't have it… [When] I told [NAIT] I was denied, they said, "well there's people waiting and we can't give you any more extensions."

In sum, institutional inflexibility in areas such as attendance, scheduling, funding and class size as well as lack of academic support make it difficult for marginalized learners to participate in formal educational opportunities.

Lack of Information About Learning Opportunities

Interview and focus group participants reported a lack of information about educational opportunities that is accessible, encouraging and seems relevant to the needs and circumstances of marginalized adults. This includes detailed information on course content, format, location, fees, funding and childcare.

A woman in a program at Wecan Cooperative didn't "know a lot about where to go and where to find out" about how to move forward in achieving her educational goal of upgrading and then entering a social work program and wasn't "too much of a person to search on the internet." One participant, a fifty-year old woman who had attended a program at NorQuest, felt that lack of preparatory information about the program prevents some people from doing well in institutional settings.

> I remember half the class was gone halfway though… They should have probably taken upgrading. They should have probably did more of an extensive research of what it requires… What prevents them [from doing well] is if they had some kind of counsellor talking to someone and making sure that this is exactly what they want…. Knowing where people are at before they come in.

Moreover, available information may not always be getting through because of the overwhelming nature of managing day-to-day. According to one woman who left an abusive relationship and is now in a pre-employment program at DECSA, "as far as knowing how the education system works and, you know, the opportunities that were out there, it took me a little bit longer to figure it out because I was so absorbed in the rest of my life." According to a focus

group participant, for newcomer immigrants, "the concept of filling in the paperwork to apply for bursaries and loans to go to school is overwhelming if they don't have the language." Often participants weren't aware of the range of educational opportunities such as one Aboriginal woman who admitted, "NorQuest is the only one I know about."

At almost 20% (19.8%), lack of information about learning opportunities was the fifth most frequently cited barrier by survey respondents.

In sum, lack of information about where to go, what is offered and the range of opportunities for educational programming was an institutional barrier experienced by marginalized adults.

Discussion of Institutional Barriers

Through many examples, participants revealed that, rather than learners not being ready to learn, institutions are not ready for learners. Participants reported institutional barriers related to insufficient flexibility and support and to lack of relevant, timely and accessible information. While at the same time as attempting to meet the needs of marginalized adults, institutions establish policies and procedures that limit the learner's successful engagement with the services intended to serve them.

Educational institutions are complex systems created within the social vision and policy framework of particular societies. As such, their policies and procedures mirror the way that society is organized economically, politically and socially. Similar institutional barriers that unfairly limit citizens' access to public services are reported in the health care and social service sectors, and these are often linked to educational access. For example, poor literacy levels and/or language skills make it difficult to access a full range of health care services that often require significant levels of reading or language comprehension to negotiate successfully (Chovanec & Foss, 2006).

Structural Barriers

Structural barriers are constraints built into the system of society that are beyond the immediate control of individuals. They include longstanding systems of marginalization based on socio-economic class, gender, race, ability, sexuality and so forth. They are directly connected to the social, political and economic systems that shape and are shaped by a particular society.

Structural barriers are rarely included in literature addressing access and barriers to learning opportunities. However, we follow Conrad's (2001) lead in drawing attention to the inequality of opportunity that is embedded in the economic, social and political structures of our society, particularly the social stratification and discrimination that creates inequality of opportunity and social exclusion.

Many structural barriers reflect systemic forms of discrimination based on age, race, gender, nationality, class and (dis)ability. Livingstone and Scholtz (2006) found that perceived access varies by race and gender, with white males the least likely to experience barriers (36%), and non-white females to experience the most (55%). Women also typically bear the larger burden of child-care (Spellman, 2007), adding to the complexity of pursuing learning. Participation and completion rates appear to be lower for divorced women, lone female parents, and for women with young children in the home (Holmes, 2005; Zhang & Palameta, 2006).

Regarding Aboriginal learners, Malatest and Associates (2004) report, "Longstanding problems of lack of preparation, alienation and isolation,… limited federal and Band funding, limited support for specific Aboriginal groups such as Métis, mature students and women with children, the under-representation of Aboriginal people in some subjects such as sciences and the health professions, and limited support in postsecondary institutions" (p. 41).

Skilled immigrants face an uphill battle to achieve parity with Canadian-born workers (Hawthorne, 2007). French or English language skills and/or employers' lack of recognition of foreign credentials and work experience mean that many skilled immigrants find themselves unemployed or underemployed. Often, these individuals will seek additional language training or forms of re-training or re-credentialing to improve their opportunities to work in their professional fields.

As Clayton (2000) argues,

> A range of factors contributes to social exclusion, and people of all ages may be excluded from participating in the normal social and economic life of the country in which they live. In a modern economy, the single greatest symptom of social exclusion is likely to be low income, arising from unemployment or precarious or low-paid employment. Poverty and social exclusion are not, however, synonyms… Furthermore, "social exclusion" means that processes are at work [outside] the control of the individual. People rarely, if ever, "exclude themselves"… We would add those who are disadvantaged by age, sex, class, postcode, ethnicity, religious background, employment status, illiteracy, rurality and refugee status. (p. 3)

In the quote above, Clayton identifies two key ideas that are echoed in our findings from this study.

- Income is an important element of socially constituted marginalization
- Low-income in combination with other social factors further marginalizes citizens

Income and Social Class

Our analysis supports literature that contends that income is an important element of socially constituted marginalization. As we coded the interview data, we identified numerous indications of concerns related to funding. Upon careful analysis of this code, we realized that the participants were actually alerting us more to their income level and their position in the class structure of society than to funding per se.

We identified two key themes relative to income and social class.

- Lack of income shapes and constrains priorities and choices
- Having to work interferes with (formal) learning

Lack of income shapes and constrains priorities and choices

Adults whose household income is already low found it difficult to manage the costs involved in taking up learning opportunities. "My financial situation is the problem," explained one woman. "It's my low income," said another. In addition to tuition and living expenses, other costs such as entrance fees, transportation and books eat into the money already targeted for basic needs.

Although many people face concerns about financing their education, we framed these concerns as structural barriers because they are a function of the income and socio-economic class position of these particular members of our society. Issues of funding do not affect people with economic resources and do not constrain their choices *to the same degree.* We concur with the assumption of one focus group participant, "If you had lots of money, those [other] barriers would not be as great."

Given their low income, marginalized adults are very conscious of priorities across multiple demands. Very frequently, we noticed that if the choice were between the needs of one's family and one's own education, the interview participants always chose family. This was evident in the many examples of parents who had no means of paying for childcare when their children were sick or injured so risked falling behind or expelled from their programs. More than one had to drop out to care for sick children. "When my daughter got sick, and I had to make a choice to either study or take care of my daughter, of course, I chose to leave my studies behind and dedicate myself to my daughter."

One 46-year old woman living in social housing didn't finish a bachelor's degree in order to care for her three children: "I just like being home with my kids… I'm focused on them." Typical to many immigrant families, a Chilean woman had a commitment to send a bit of money to her family in Chile on top of all her other expenses. So, "I didn't have enough money to study, to work, and to have enough money for myself. It's not a huge amount that you can send back home to Chile but at least it's helpful to them."

Interview participants expressed concern about finding funding and about being in debt from the cost of their education. A 32-year old Aboriginal man was aware that, "even to get funding or anything like that – income – is a barrier." A woman attending a program at Wecan Cooperative was worried about getting funding to attend upgrading because she was "withdrawn" from a previous program when her son was sick and she didn't have all the documentation "to back it up… So, when I go back to school, it's going to be 'where am I going to get my funding?'"

Some interview participants knew that they would have to apply for a student loan, such as another young woman at Wecan who doesn't "see my parents or me just dropping cash like that because it's not that easy." Finding funding, she said, is her "biggest task." A focus group participant thought that being "low-income for a long time and debt ridden at the end of the day" was a deterrent for many marginalized adults contemplating educational programs.

Twenty-eight (28) survey respondents (26.4%) identified cost as a barrier. An equal number of males and females reported that they had difficulty participating in learning programs/activities because they were too expensive and the same number said that there was not enough funding. Although the numbers on the two items are identical, responses were from an overlapping but different group of respondents.

Types of barriers and difficulties encountered	Female	Male	Count	%
Too expensive	14	14	28	26.4%
Not enough funding	14	14	28	26.4%

In sum, marginalized adults were constrained by limited income that must stretch across multiple demands, they often prioritized the needs of their families, and they were worried about how they could obtain funding to return to school to achieve their educational goals.

Having to work interferes with (formal) learning

There was a strong sense among interview participants that having to work interfered with educational goals. Many felt that they couldn't go to school because they had to work. A young male newcomer immigrant recognized, "If you have to go for higher studies [in Canada], you should be working, you should have some savings and then you can afford your higher studies."

For others, studies were derailed by other financial obligations, such as the woman in the following quote:

> I worked mornings. I didn't have enough money because I also had to help out with money for our household so I didn't' have enough money to pay for my studies. So I studied for a year and a half and I [stopped] with the intention of being able to come back one day and finish the course which was three years long. I never had enough money to be able to go back and finish my studies.

In her case, even informal learning was impacted by limited income. While working part time but still having to "pay for everything," she "had to forget about tai-chi, temporarily."

A man from India recalled that, in his youth, he was admitted to a "degree college" after finishing at a "diploma college," "but due again to my financial background, I had to apply for a job… and once I applied for a job, then my career started so I could not learn." Another young man dropped out of an apprenticeship program because "I had to go to work… just to cover all the financial problems we were having at that time."

In sum, for marginalized adults who work in order to meet basic needs, working interferes with educational goals in a number of ways: some can't go to school because they have to work and others don't finish their programs because they have to work.

Low-income is More Than Income

How marginalization is constructed and defined in society was the subject of considerable discussion in the focus groups. Focus group participants challenged us on our use of the term "low-income" and helped us to reframe our understanding of the target population from the outset.

The findings from this study clearly indicate that income is not the only factor that marginalizes citizens. Low-income, complex and overwhelming life circumstances, and systemic discrimination based on race, gender and social class (among others) work together to construct social exclusion and marginalization in our society. Focus group participants, such as the one quoted here, recognized "underlying barriers that perpetuates the situation, like racism, social status, ability and also, to some extent, gender."

We have already described the overwhelming and precarious life circumstances of marginalized adults in some detail in the section on situational barriers. The following excerpt

is from a focus group that was attended by representatives of some of the grassroots inner city agencies. We recapture it here because it so clearly expresses an analysis of structural barriers.

> They have a desire to be an adult learner. But the system and other variables play a barrier to that. "Low-income" maybe captures just one part of what is stressful. For these individuals, I mean, they're going through a ton of other things, you know, such as racism or just general oppression. To say low-income maybe is a little bit too narrow… [It] connotes a definition aligned only with a dollar sign.
>
> Whenever I see low-income, I think it's a mixture and a combination of everything, right? We're talking about individuals who are single moms, single dads, lots of kids, right and they're suffering financially… So there's a lot of barriers.

Interview participants identified troubling instances of discrimination. Participants who were Aboriginal or from a visible minority related incidences of abuse based on discrimination – from name-calling to stereotyping to denial of rights – that occurred in workplaces, social contexts and educational settings. Other examples are the systematic devaluing of the professional credentials of newcomer immigrants and developing an "inferiority complex" about English language skills.

Gender discrimination was evident in women's marginal experiences in workplaces, incidences of sexual and other forms of abuse, and the under-recognition of the motherwork of women. One woman was fired from a job because "they didn't want women working in the kitchen."

Fall-out, such as isolation, addictions and mental health problems, further compounded the experience of marginalization.

Moreover, interview participants acutely recognized their marginal social class positioning in society. They felt stigmatized by their poverty, their lower levels of education, where they live and their racialization. A focus group participant reflected:

> Low-income puts you already in a lower scale because, you know, in a way you're not that successful, according to the paradigm we live in. A [low-income] adult learner in a way is also a double negative against you because, by the time you're an adult you shouldn't be learning, you should have already learned. So, in a way, there's a stigma that's put upon a low-income *plus* adult learner.

The woman who didn't have the money to pay the $250 deposit fee at NAIT knew from experience that she was more financially constrained than others: "The two-fifty thing is, like, frustrating because I know for some people, that's nothing, but… I looked wherever I could [and] I just couldn't get it."

Another woman shares an astute observation of how the social class structure in our society works in relation to education:

> Some of the people's families are highly educated all the way back – doctors, lawyers – lines and lines of families. And then there's families like mine. You know, my grandfather worked construction his whole life and, you know, he took care of us… They were really working class people but not educated… He passed away in his early 70s, you know, because he worked so hard. His body just started to give out on him. He ended up getting something

> wrong with his lungs and his legs were giving out on him. He worked himself to the bone… I kind of thought, you know, "I'm a mom. I'm low income. I am kind of stuck paycheque to paycheque. I don't have a choice. I don't have time to go to school. I've got to raise my kids."

A focus group participant surmised that "people are not happy being low-income people" and another, in thinking about the working poor, said, "they want to get out of that cycle because their income is low and they have aspirations to move up to middle class or upper middle class."

In sum, marginalized adults are defined by a complex fusion of income, life circumstances and social situation, as well as race, gender and other forms of discrimination that work together to locate them as a social class. Moreover, they recognize their historical positioning in the social structure and acutely felt stigmatized and entrenched at the margins of society.

Discussion of Structural Barriers

Many adults experience systematic marginalization based on their social class. Defined by a complex mix of limited income and multiple barriers that include discrimination, their social class is an outcome of the inequality of opportunity that is embedded in society's social structure. These structural barriers make it extremely difficult for marginalized adults to gain access to educational opportunities. As more than one focus group participant observed, "being low-income in Alberta is [because of] the social structure we live in… the structures of capitalism… There is a group of people that are left behind because of the structure of society."

Within a capitalist economic system, many of the marginalized adults in this study could be classified as the "underclass" – the societal strata that is weakly connected to the formal economy, experiences chronic poverty across generations and is entrenched in social contexts that perpetuate these circumstances (Van Haitsma, 1989). Nesbit (2005) refers to the underclass as people who are considered outside or largely excluded from the economic order, including those with severe mental illness or drug addiction, the long-term unemployed, recent immigrants and prisoners.

Although definitions of the underclass are contested, many put emphasis on individual deficiencies. Those in the underclass are often considered to be the architects of their own lack of "success" and are stigmatized. In the context of our examination of structural barriers, however, Van Haitsma (1989) offers a more relevant definition that, in her view, has more productive policy implications. Because she defines the underclass as a "distinctive socioeconomic class," she "brings social structure into the underclass definition in a very concrete way by drawing attention to the actual mechanisms by which larger social forces are translated into unequal outcomes across groups" (Van Haitsma, p. 31).

For example, Chovanec and Foss (2006) review the literature that makes an explicit connection between poor health, poverty and lower levels of literacy and education. They claim that no matter how much attention is paid to empowering the individual "neither literacy nor the material realities of citizens will improve, because the current system is built on maintaining these divisions" (p. 223). This concurs with the views of a focus group participant who said, "In society, particularly in Alberta, we're not out to help people go to university because we need people to do the other kind of work" such as trades and service work that require less formal education.

The relationship between education and poverty is well documented and often theorized using a structural perspective that looks for the root causes of marginalization within the social structures of our society (Wotherspoon, 2004). As Nesbit (2005) explains, much of what we believe and do is shaped by our social location in the economic and social hierarchy. Low socioeconomic status and low education participation in one's family of origin is a consistent predictor of low participation in learning as an adult (Norman & Hyland, 2003; Walpole, 2003). Educational systems socialize people into accepting their position in these economic and social systems, perpetuating where privilege and power are located in society.

As we described earlier, Bourdieu's (2001) ideas about forms of capital is a useful theory for examining these relationships. He contends that economic, social and cultural capital work together to intergenerationally privilege or marginalize particular social classes. The participants in this research project provided ample evidence of how this theory works in their lives.

Reconceptualizing Barriers

In summary, because learning barriers are themselves complex, their underlying causes are difficult to discern. What is clear, however, is that barriers are multiple, overlapping, and mutually reinforcing. More often than not, these barriers create negative and reiterating patterns that are perpetuated across generations. Marginalized learners are, generally, marginalized citizens in a much broader sense, meaning that they experience social exclusion. This is a bleak portrait, but an accurate one.

Given our analysis of barriers, we are recrafting the language of "barriered learners" and "low income learners" to be "marginalized adults." We wish to convey that it is not the learners that are fully responsible for their social position in society or that they will be able to independently overcome these barriers. The literature often suggests that learners are, for instance, reluctant to leave their home communities and social supports to pursue learning. Rather, the question might be, why should learners be required to leave these life-giving supports? Often these kinds of expectations are the ones that lead learners into new situations in which they do not have the supports they need to be successful learners, as our findings have demonstrated. So, while it is important for individuals to address issues that are within their control to change, it is also important to recognize the situational, institutional, structural and barriers that conspire against their aspirations. However, the system of adult education can calibrate its offerings to meet learners where they are, for instance, through what is often called a "third sector" of adult education based in community-level organizations.

Pedagogical Practices for Marginalized Adult Learners

The Research Framework for Studying Pedagogical Practices

Pedagogy refers to the principles, methods and activities of teaching and learning. Adult education scholar, Malcolm Knowles (1970, 1975, 1980) used the term andragogy to propose that the teaching of adults can be distinguished from the teaching of children by a set of characteristics that are unique to adults. However, this perspective has been hotly contested in the field. Spencer (1998), for example, contends that the focus on andragogy "misses out on an understanding of adult education as a distinctive social activity… It is not an all-embracing

theory of adult education" (p. 19). Therefore, in this report, we use the more accepted terminology of "pedagogy" to discuss best practices for marginalized adult learners. Nonetheless, many of Knowles' ideas have gained purchase in the field of adult education and guide many of the best practices in use today.

While the notion of best practices is problematic in that it does not account for specific contexts and learners with particular needs, it is important to briefly identify the most well established principles and approaches in the education of adults, whether in formal or non-formal settings. We used these principles in our analysis of the data and in our recommendations.

According to Selman and Dampier (1998), UNESCO defines adult education as:

> the entire body of organized educational processes, whatever the content, level and method, whether formal or otherwise, whether they prolong or replace initial education in schools, colleges and universities as well as in apprenticeship, whereby persons regarded as adult by the society to which they belong develop their abilities, enrich their knowledge, improve their technical or professional qualifications, or turn them in a new direction and bring about changes in their attitudes or behaviour in the twofold perspective of full personal development and participation in a balanced and independent social, economic and cultural development. (p. 18)

In this sub-section, we review key adult education principles and approaches that guide our study of pedagogical practices for marginalized adult learners. These are:

- Self-directed learning
- Holistic learning
- Experiential and participatory learning
- Safe learning environments
- Critical reflection and transformative learning
- Knowledge construction and problem-posing
- Non-Western perspectives of learning and knowing

Self-directed Learning

The notion that adults ought to have learning conditions that enable them to be or to become self-directed learners – with a role in identifying their own learning needs, setting learning goals, creating knowledge and evaluating the learning process – has become a primary tenet in the adult education field. This is consistent with the idea that learning happens naturally and thus, the goal when working with adults is not how to motivate them but how to avoid blocking or demotivating their learning. In a critical review of the literature on self-directed learning, Chovanec (1998) identified a number of resources for encouraging self-direction in the learning environment but also critiqued SDL's over-reliance on cognitive processes and an individualistic orientation to learning. These limitations are addressed in many of the other approaches covered here.

Holistic Learning

There is now a range of theories on a holistic approach to teaching that considers the different dimensions of learning. Griffen (1988) uses the metaphor of a guitar to discuss the six dimensions of adult learning. She classifies the six strings of the guitar as: cognitive or rational; emotional; social or relational; physical; metaphoric or intuitive; and spiritual. She suggests that educators should try to reach all these dimensions in their teaching.

Brookfield (1995) contends that some of the most significant learning occurs in intimate relationships and often with high emotional investment. As learners engage in adult learning, a deep level of learning is triggered that impacts the learner's identity and belief system. Learning can often be difficult and painful, creating emotional upheaval for the learner and affecting their family and work commitments (Cranton, 1994). As Kasworm, Sandmann & Sissell (2000) indicate, "learning through higher education is not just a mental journey; it also is a very treacherous journey engaging the heart and identify of the adult" (p. 458). Wenger (1991) suggests that this kind of learning is best done within learning communities.

According to the Royal Commission on Aboriginal Peoples (cited in Bell, 2006), a framework to develop life-long holistic education would attend to the following:

> In Aboriginal education tradition, the individual is viewed as a whole person with intellectual, spiritual, emotional and physical dimensions. Each of these aspects must be addressed in the learning process. The circularity of the medicine wheel urges us to keep the whole picture in mind. (p. 5)

Experiential and Participatory Learning

Extrapolating from Knowles, it is now orthodoxy that the most conducive learning conditions build from the rich life experiences and desires of adult learners. If the learning process starts from the existing life experiences and knowledge of the learners, then they become engaged and begin to scaffold their learning from their existing knowledge base. Experiential learning is also a vital pedagogical component not only for bridging new learning from past experience, but also by using concrete, sensory experiences to facilitate the integration of new learning into the existing knowledge framework. Experiential learning is achieved in a variety of ways including field trips, simulations, case studies and projects.

Kolb (1984) discusses experiential learning within the context of a learning cycle. For him, learning begins with a concrete experience that is either facilitated or draws from lived experience and relates to the topic, then is followed by reflective observation when the learner considers the topic from a number of viewpoints, then introduces abstract conceptualization wherein the learner uses logic and theories to understand the topic and finally, active experimentation where the learner works with the learning in a practical way. He suggests that these stages occur repeatedly within a learning engagement.

In addition, rather than passive information-giving methods as a sole approach, participatory and interactive learning provides a space where adults can discuss, process, and then apply their learning both individually and collaboratively (Silberman, 1996). In other words, discovery-based learning introduces a deeper kind of learning when the participants explore and evaluate sources of knowledge themselves, thus learning how to learn. Although creating situations where the learner participates fully in the learning process takes more time, it

provides space for reflective activities in which learners can receive and integrate new ideas and meanings. This concept of participatory learning emphasizes a learner-centered approach focusing on the autonomy of the learner in terms of choices within the learning situation and full engagement in the act of learning, enabling learners to develop a sense of competency and to organize their meaning-making processes (Perry, 1970).

Safe and Collaborative Learning Environments

To foster this learner-centered and dialogical approach, Lewin (1948) was an early proponent of learning environments that provide a sense of belonging, security, and freedom to make choices and freely examine reality. Knowles (1975) describes an environment that reduces distress and fear by building mutual trust, respect and safety, thereby enhancing self-esteem. This was later expanded in Daloz's (1986) contention that learner growth is best promoted through a combination of high support as well as high challenge, often most effectively manifested in a mentoring relationship with learners and best activated in small groups. Kasworm et al. (2000) assert that adult education should assist in providing a safety net of supports that work with, not oppose, the realities of the adult life-world.

MacKeracher (1996) highlights the importance establishing learner networks through small group and peer teaching methods that lead to the formation of peer relationships and possible study partnerships and alliances. Such collaborative learning is a cornerstone of accepted adult education practice where, through interactive communication and an exchange of knowledge among peers and the educator, learners can renegotiate existing meanings, compare opposing viewpoints, co-construct new meanings and let go of unviable meanings.

Furthermore, a safe, nonjudgmental environment can encourage, influence and affirm learners while also challenging and disrupting existing forms of thought. Brookfield (1995) has called this educative role one of an "empathetic provocateur."

Critical Reflection and Transformative Learning

Brookfield (1995) and others have highlighted the importance of fostering critical reflection. Critical reflection on past experience can "[bring] to critical consciousness the assumptions and perspectives about knowledge and social processes learned uncritically" (p. 4).

Such theorists assert that much of adult learning has been habitual and comprised of ideas learned uncritically from families, schools and the culture at large. Through dialogue, learners can reflect on the ideas and assumptions that populate their mind, critically examine these ideas and explore a number of alternative viewpoints. As MacKeracher (1996) describes, a learner becomes a researcher and a theorist, investigating and analyzing themselves and the world they live in, as they engage various formal bodies of knowledge.

Brookfield (1995) suggests that there are four components to critical reflection:

- Recognizing and questioning basic assumptions
- Being aware of the historical, cultural, social and political-economic contexts in our lives that shape our beliefs
- Imagining and exploring alternatives
- Becoming skeptical about ideas and practices

Mezirow (1991) advocates that the purpose of transformative learning is to develop autonomous, socially responsible thinking. For him, transformative learning helps to develop perspectives that are more inclusive, discriminating, self-reflective and integrative. Given the rapid social changes in our society, many contradictions arise as traditional authority structures break down and a diversity of beliefs and practices surround individuals. This phenomenon requires adults to rethink their assumptions and to acquire new perspectives for accommodating diverse ways of thinking and for informing their daily decision-making in new ways. Transformative learning is about examining the very premises of one's thought system and confronting contradictions that no longer fit into one's existing worldview. This can be extended to many topics and areas of adult living, including reconceptualising one's way of working and living from a sustainability perspective that can lead to new forms of work (Lange, 2004, 2009).

Knowledge Construction and Problem-Posing

In advocating a politically-engaged form of transformative learning, Freire (2003/1973) declares that learning ought not to be a kind of "banking" education where knowledge is considered an inert commodity that an educator deposits into a learner and then the learners make their deposits on an exam or other assessment for the educator. Freire asserts that this form of education prevents learners from developing critical capacities that prepare them for their role as citizens in a democratic society. Rather, learning is a process of engagement wherein learners can become critical and creative producers of the conditions of their existence, thereby shaping who they are, their destinies and their societies. Freire called this the task of humanization and considered it to be the fundamental purpose for adult education.

To do this, Freire developed an educational method of problem-posing about the taken-for-granted aspects of one's reality. Through group dialogue, this process fosters democratic relations between learners and educators and further develops the relations necessary for a more equitable society. In this way, learners develop their own knowledge as they collectively discuss, describe, analyze and act collectively to make meaning and construct knowledge for themselves. They also participate in changing the society they are in by experiencing more equitable educational relationships and carrying this experience out into the wider society. This means that educators need to let go of authoritarian ways of teaching and gain the respect of learners through their experience with the content and in providing an appropriate learning environment.

Indigenous and Other Non-Western Perspectives on Learning and Knowing

As migrants and Indigenous populations across the globe increase, the diversity of learners in educational settings is likewise increasing. It is becoming clear that the Western intellectual tradition is unsuitable for the diversity of learners and is complicit in the stories of failure to adequately meet the needs of vulnerable populations that have experienced violence, colonization and efforts at complete assimilation. Recent educational research is now focusing on how non-Western knowledge systems can contribute to better educator preparation programs.

As many scholars have indicated, education is cultural work, often embedded in at least one knowledge system that generates a particular way of knowing and being. "Educators need to be able to recognize that knowledge systems develop in specific places among specific groups or people" (Kelly, Schultz, Weber-Pillwax & Lange, 2009, p. 263). Growing out of specific languages

and lands, these knowledge systems represent different systems of rationality, philosophy, psychology, history, ethics and spirituality. Educators must recognize their own way of knowing as well as respect alternative ways of knowing. One example is acknowledging that storytelling, sacred ceremonies and observation are common forms in Indigenous pedagogy, and are legitimate alternatives to practices in the Western model that is based on an impartial, detached reasoning way of knowing. Yet, as Battiste (2002) writes, the distinctive features of Aboriginal knowing and learning are "as diverse as Indigenous peoples are in Canada and beyond" (p. 18). Therefore, Indigenous learners require only "a nourishing educational system and direct experience with the good road to unfold its ancient wisdom and teaching" (p. 29).

Battiste (2002, p. 18) adds that Indigenous knowledge is founded in the theories, philosophies, histories, ceremonies and stories as ways of knowing and learning. She reports that Indigenous pedagogy is based on a preference for experiential knowledge, i.e., learning by observing and doing, on learning through authentic experiences and individualized instruction, on learning through enjoyment, and on learning in a holistic environment that embraces psychological, physical, emotional and cultural needs. Indigenous pedagogy accepts that every learner is unique in his/her learning capacities, that students search for learning processes they can internalize, that the Aboriginal learner wishes to acknowledge the sacredness of life and to generate the spirit of hope. It embraces both the circumstances people find themselves in and their beliefs about those circumstances in a way that is unfamiliar to Eurocentric knowledge system. It acknowledges that the goal of Indigenous education is to generate the meaning of work as a vocation and as a mission in life and to open a new cognitive space in which a community can discover itself and affirm its heritage and knowledge in order to flourish.

The Research Questions about Pedagogical Practices

We did not initially set out to investigate pedagogical practices directly. Therefore, there were no questions directly targeted to pedagogy in the focus groups, interviews or surveys. However, we did anticipate that, in the course of telling us about their learning experiences and needs, participants would give us information about the strategies and approaches to learning that they found useful or not. This proved to be the case, especially in the interviews where participants had ample opportunity to talk about what was important to them. While drawing upon their past experiences in the course of sharing their learning journeys, interview participants shared many examples of pedagogical practices.

Additionally, in both the surveys and the interviews, we asked participants about their preferred places of learning. Their responses to these questions also contributed information about pedagogical practice. Focus group participants incidentally identified various practice ideas as they discussed some of the learning challenges and opportunities faced by marginalized learners. Moreover, we sometimes extrapolated helpful approaches from the many descriptions of unhelpful experiences that the participants described.

From the Data

In this section of the report, we identify the key themes that emerged largely from the individual interviews, but supplemented by the focus groups and surveys. These include:

- Informal and incidental learning
- Community building

- Experiential learning
- Flexibility
- Variety and repetition of recruitment strategies

Informal and Incidental Learning

It is often thought that marginalized adults are not involved in learning activities. However, our findings illustrate that marginalized adults are involved in learning that is largely informal and incidental. As learners who often have a history of failing, participants chose less vulnerable sites of learning, including from peers, agency personnel, the internet and the library. Moreover, they have been shut out of more structured educational settings because of the many barriers that we identified earlier. Thus, their learning is often richly embedded in other activities, may not be overtly recognized as a learning experience, and is part of an interest-seeking, problem-solving or issue-understanding process.

In support of this perspective, approximately one-third of interview respondents reported that they preferred to learn at home or in community agencies and organizations. One-third also identified colleges as preferred places of learning but less than one-fifth preferred to learn at a university.

Preferred places of learning	Count	%
At home	38	35.8%
At any agency or organization	32	30.2%
At an agency or organization that I am familiar with	30	28.3%
At a college	30	28.3%
At a university	18	17.0%

Community Building

Adults who are negotiating multiple challenges and overwhelming life situations gratefully recognized the value of community with respect to learning. The notion of community included people with whom they have developed relationships such as family, agency workers, peers or teachers. Learning as part of a community not only increased their comfort level in the learning environment, but learners also identified community building as a critical component that enabled their success. By sharing their own learning experiences and hearing the stories of others, learners began to develop a sense of community where they felt like part of a "team," where they had a "support system" or their "own little group," and where they could assist and rely on each other. According to a focus group participant, "You better start to develop a collective mentality; it's got to be community based and I mean, truly community based." As the literature bears out, this is one of the most vital elements for retaining learners in a learning program and for enhancing their likelihood of success.

A variety of themes are related to community-building:

- Reducing isolation and mentoring success
- Transforming social exclusion to social inclusion
- Offering encouragement and hope
- Group dialogue and peer learning

Reducing Isolation and Mentoring Success

Meeting other learners in similar life situations as well as seeing other learners succeed was a community-building activity that significantly reduced isolation. By sharing information and stories about their life circumstances, learners began to see that they were "not the only one" and that what they were experiencing was a collective experience. They began to establish supportive bonds with one another as they found "something that connects us together." As one learner commented, having the opportunity to share with others helps one understand that others "went through the same thing as I went through." A focus group participant said the same about peer group support.

Learners also gained knowledge of success strategies by listening to one another. One youth commented that learning "what other kids do in different situations" provided an avenue for skill development. He explained, "I look at it, and I'd be like, it's something that I can apply to my life." The learner's underlying sense of affinity and commonality with other learners, facilitated through community building processes, created the opportunity to learn from the life experiences of others.

Transforming Social Exclusion to Social Inclusion

Without a sense of belonging, learners often felt excluded and began to disengage with the learning experience, as one woman from a visible minority experienced when she changed high schools. In sharing their stories of not "fitting in" or not "belonging," many learners talked about racism and discrimination. However, connecting with others was a way of moving from exclusion to inclusion: "Once people get to know you then, like, [as a] minority… it doesn't really matter." Many learners talked about their "community" of support in the programs they were attending.

Community building can reduce the likelihood or mitigate the effect of social exclusion. When learners were able to interact with one another, in a formal learning environment, or initially in an informal social learning environment, they were able to begin the process of healing. As they experienced social inclusion in a learning community and understood how others addressed exclusion, they developed ideas for handling their own experiences of exclusion and how to be more inclusive in their own social relationships. They began to "learn how to appreciate somebody for who they are" and "learn how to tolerate and how to deal with the person."

When one focus group participant successfully included marginalized adults when she opened up her inner city school's learning spaces to the parents and families of her students to socialize and connect with others, and another initiated a "rec night" to "work on developing positive social connections."

Offering Encouragement and Hope

Many learners talked about the importance of having the support and encouragement of someone who "believes in you," a "cheerleader" to repeatedly remind them, "you can do it, you can do it." Encouragement was a vital support for learners who have been beaten down by the system and who have developed a negative learner identity. As one individual stated, "for people like me… you need encouragement." Encouragement in a learning community helped build confidence and motivated some interview participants to re-engage in a learning opportunity despite the detractors among their significant others.

> I didn't think I could do anything… and everybody is like "no, you can't do it"… then I came here and then they just gave me such good support about it all, saying "yeah, we'll help you" and that's what helped me along.

Interview participants reported that they did not enjoy previous learning experiences where they felt like "just another student." In many cases, they identified the importance of being known, feeling valued and receiving support and encouragement from the teacher. Participants talked about the human element in learning as an important factor. "People do so much better when they're nurtured and cared about." For some learners, the teacher's encouragement is their only means of support: "Sometimes you don't have the support system that you need besides the teacher." Teachers who were "gentle," who talked in "plain language" and who recognized the value of the learner were those that helped build their confidence. "They would make you feel like you were somebody and that you did have a brain and you could use it."

Interview participants valued support for their whole person and for the realities of their life circumstances, not just support in understanding the course content. They talked about the importance of teachers who "make you feel comfortable." These teachers were "understanding," "approachable" and willing to provide the space to "talk to them about basically, your problems." They looked to the teacher for validation of their ability to learn but also beyond that, for their ability to handle their life issues. They wanted teachers to recognize that "you're human and you count and you matter."

In all focus groups, participants focused on the importance of welcoming, safe environments and trusting, respectful relationships. As one said, "The first thing… is relationship, relationship, relationship." In one group, participants talked about "creating that safe environment where they're not going to be judged about the different kinds of learning that they would like to do," where "you're looking at ways of engaging people, at having people explore their strengths, developing stronger capacities."

Group Dialogue and Peer Learning

Interview participants valued the opportunities to learn from each other as well as from their teachers, facilitators or instructors. They identified group work, as opposed to lecture-based classes, as one way that they could interact with each other socially and learn from each other. Many reported that they valued "sharing" and "discussing." When learners engaged with each other, there is "more to learn" from each other. As is well documented in the adult education literature, this approach can enhance the learning experience. When asked why he liked school, a 47-year old man replied, group work "makes a stronger community" and allows learners "to be with people and learn from them." Peer learning also allowed for an active learning environment that integrated the learning beyond mere recital. Participants felt that they

benefited from the active nature of group work because, according to one young man, it's hard to "really retain something if I'm just sitting and listening to instructions, or even just passively sitting and listening. It's better if there's some sort of discussion."

Summary

In terms of community building, marginalized adults valued learning environments that were spaces for community building, that included pedagogical practices that reduced isolation and mentored success, that aimed to transform social exclusion to social inclusion, that offered hope and encouragement and that used group dialogue and peer learning strategies.

Experiential Learning

Many interview participants reported that they preferred hands-on, experiential learning to be incorporated into programs rather than just abstract knowledge and lecture delivery. As one participant suggested, they are better able to process information when they have a chance to apply it, "I learn well when I am put in a situation and given a chance to just do it." According to a focus group participant who worked with Aboriginal seniors, "talking doesn't' work, they need props.. we should demonstrate what we're talking about."

Examples included a number of suggestions that would allow learners a chance for "learning outside" the traditional classroom. They identified a number of helpful experiential learning opportunities such as leading and mentoring other learners, making field trips that bring life to the content, as well as job shadowing and work experience that would help them assess the suitability of various occupations.

Leadership and Mentoring

Interview participants spoke of opportunities for leadership as important for "getting a little more confidence." Leadership activities sometimes assisted the learner in overcoming self-esteem barriers that were derived from the belief that they were not capable of success in a learning environment. Leadership opportunities enabled them to foster a new belief in their abilities, which also impacted their ability for success in other parts of their lives. The leadership activities that participants identified included: volunteering, organizing conferences, helping fellow learners, mentoring and tutoring others, being a literacy "ambassador" in the community and giving tours to new students. These experiences enabled learners to build social capital, communication skills and other interpersonal skills as well as a new identity as a successful learner.

Interview participants identified mentoring and being mentored as vital ingredients in a successful learning experience. Seeing concrete examples of others who lived in similar circumstances achieve success created hope and a vision of a path to follow. They were inspired by the models of others who had been successful, such as in the case of a young woman coming into the city from a Reserve.

> My older sister graduated and went to a university. She was a couple years ahead of me and my parents were so proud of her because she was one of the first ones from our Reserve… Seeing my parents that proud, it drove me to pull up my socks and study real hard and then I graduated and went to a university as well.

Conversely, they felt that they too could be "setting an example" and "showing them you can do it." Some learners felt this was important for their siblings and children to witness. The participants understood that being mentored and in turn being a mentor was part of a leadership process that would reverberate throughout their families and communities.

Focus group participants gave examples of "handing over some of the leadership and the responsibility" to parents in the school and of giving "parents the opportunity to set the agenda" for parenting workshops. One felt that mentorship was an example of incidental learning and another, working with newcomer immigrants, identified the significance of providing "opportunities for people to learn from each other." Participants also mentioned role modeling and volunteering "so that they're also not always feeling like they're receiving, that they able to give back as well."

Field Trips

Participants liked field trips partly because the learning climate was "more relaxed," more "fun" and allowed learners to interact with the instructor in a more informal way. Field trips also provided a different approach to learning, exposed the learner to resources in the community and, for some, reduced the anxiety experienced while building interpersonal skills.

Job Shadowing and Work Experience

Interview participants expressed interest in experiential learning related to employment. Job shadowing and work experience would lesson their fear of making the wrong choice about a career, being unhappy later, and wasting their limited resources of time and money. Like many postsecondary students, one participant expressed, "I'm scared to go to school for many years and then find out that I don't like the job that I was working towards." Another reiterated, "So maybe more job shadowing opportunities… because it's kind of like a gamble when you don't really know anybody that's in the profession."

Participants saw value in the opportunity of being able to "call up people and ask them questions" about their work, but also to move beyond this to learning firsthand about the work environment and "ask[ing] them questions about it." "But," one added, "you don't know them. So it would be easier if you could just follow them for job shadow." Thus, job shadowing was suggested as a way to "learn things" about the type of work or the work environment that might not be captured in non-experiential ways. Further, gaining experience within the job environment demystified the type of work and familiarized the learner with the expectations.

Some focus group participants also suggested that "on-the-job training" and volunteering would help marginalized adults build skills and networks.

Summary

Marginalized adults recognized the value in experiential learning opportunities that would build their leadership and mentoring capacities and prepare them for making employment choices. They also appreciated field trips for the opportunity to learn in a fun and social environment.

Flexibility

Flexibility was one of the most important elements that interview and focus group participants identified as key to successful learning experiences for marginalized adults. Not only did learners place a high value on a small and comfortable learning environment, but also on a pace of instruction that keeps their needs and abilities central to the process, on having access to one-on-one support and on accommodation for their life circumstances.

Small and Comfortable Learning Environment

Participants recommended "small classes," "more classes instead of one big class" and "a lot of little places where you could learn" as physical environments that would be comfortable learning spaces. Smaller classes helped learners feel "more at home" and ensured the teacher could provide learner support. As one participant expressed, "That way I think that the teacher has time to meet the needs of each student." In contrast, some participants talked about situations where the teacher "just didn't have enough time with the students to get them to actually learn."

Some believed that feeling safe in the learning environment was an important factor, particularly given many of the insecure and often, abusive learning conditions that many had experienced. Not only physical safety, but emotional safety were critical in classrooms where "no one teases anybody" creating the security needed to learn. Still others talked about the physical elements of the learning environment such as "more natural lighting," being outside and "more space" for a variety of learning activities.

Pace of Instruction and Assignments

Many participants also required flexibility in terms of the pace of instruction and of assignments, where "I'd like my teacher to understand, if I'm working slow, just to give me time to get it." In comparison, rushing the learner and giving them an intense course load without access to assistance typically bred feelings of being overwhelmed and led to drop out. As previously unsuccessful learners who lacked confidence in their learning abilities, learners needed time to process new learning and were hindered when "it all moves so fast." They recognized that all learners have different needs and that when someone falls behind, there should be freedom for "learning at your own scheduled pace; that is the only way you can do it." "Trying to fit round pegs into square holes," adds one focus group participant, "negates the different life experiences, cultures, beliefs that will affect the way they learn." Tailoring the pace to the individual with smaller and more frequent assignments, and access to help as they completed the assignments, were suggestions that are supported in the literature for adults who struggle with learning.

One-on-one Support

As is evident above, many interview participants talked about the importance of individual attention from the teacher or facilitator. They had previously experienced being overlooked and were reticent to return to learning only to feel that they are "just a number in a big crowd… getting no support." Instead, participants wanted a chance to be "one-on-one with the teachers" as a space for encouragement as well as skill building. A focus group participant recognized the value of "just having that one single person hearing them out." Echoing this sentiment, several participants identified the need to augment the traditional classroom with one-on-one support:

"A small setting where the instructor is able to help me and spend more time pointing things out and how to figure things out instead of just do this, read these pages and know them, just without any help."

Many of these learners were not self-reliant initially and therefore needed the teacher to "just take the time to explain something to me if I was confused" and to help them get access to "free help to take these problems to someone that can, you know, go through them with us." Other suggestions that could help learners process the content included peer learning with the teacher acting as a facilitator, fewer lectures and more small group work.

Accommodating Life Circumstances

Many of the suggestions offered by participants are relevant and useful for all adult learners. However, the marginal social situation of the participants in this study demands that pedagogical practices be considered in light of their unique needs.

As was described in a previous section entitled *Lived Realities and Barriers*, marginalized adults are acutely aware of their daily struggles to cope with complex lives that are overwhelming and frequently move into crisis, and the impact that this has on their success in educational environments. Thus, interview participants emphasized the importance of flexibility in accommodating their life circumstances, especially when so many of these circumstances are beyond their control, such as children getting sick. They considered it unfair to be penalized for such events. "You can't help what happens at home," explained one single mother. They wanted teachers and institutions to be more "understanding of personal things that I might have been going through" and to give "a little more leniency."

Focus group participants also emphasized the need for flexibility and reiterated the importance of recognizing "the whole person," including all the many barriers they face, "in a holistic fashion."

Focus group and interview participants reported that marginalized learners require flexibility in the rules, regulations and timelines so as to make space for "empowering" them to learn. Tremendous flexibility is needed so that learners can attend to a sick child, respond to an emergency or deal with any number of other concerns that marginalized adults predictably face with few economic resources or social supports, and within an existing "hornet's nest" of barriers. Inflexible expectations for attendance in educational settings are often the "tipping point" for struggling parents that have no choice but to respond to the needs of their children. The situation described by this mother was very typical.

> This time I have kids so if something were to happen to them, I can't take that time off when you go to school. Your attendance has to be like a 100% thing. They only give you so much time off, like if one of my kids got seriously hurt and I had to take that time off, I'd be withdrawing.

In contrast, flexibility and understanding of these lived realities might make the difference in marginalized adults' ability to continue in their programs. While continuity is important from the institutional point of view, the participants were recommending conditions that would enable continuity while still allowing the flexibility to attend to pressing issues.

Summary

In order to be successful, marginalized adults require maximum flexibility in their learning environment. This includes smaller learning spaces, variable pacing of instruction, flexible expectations for assignments, individual attention and, most importantly, flexibility in accommodating their complex and precarious life circumstances. Much of this corresponds to what the leading Indigenous scholars are saying is needed for Aboriginal learners to be successful.

Variety and Repetition of Recruitment Strategies

Learners came to programs in a variety of ways, often through the more typical means such as the internet, pamphlets, television ads, print ads or through referrals from another program. More significantly, several participants talked about the importance of receiving program recommendations through word of mouth from someone they knew. A male newcomer immigrant reported, "One of my friends at the home I'm staying there, he has also done that course so he advised me to go for this NAIT course."

Participants also mentioned other direct recruitment strategies that they often accidentally encountered. In the following example, a 27-year old woman described learning about the program fortuitously.

> I actually came in [to Wecan Cooperative] to do up a resume and the receptionist said you should apply for this. Then sure enough I did and the next week I got an interview and then the next week after that I got a call and I was pretty excited about it because a lot of things on the pamphlet that is offered, is like, wow.

Participants advised that information should be visible in their own communities and existing learning spaces, and be written in clear language. However, they added, promotional materials are not enough to provide the basis for learner decisions: "Like there are pamphlets, yeah, they say what it's about, but you like to hear it from someone." Therefore, they identified the importance of "someone coming to talk" to them about the written materials, human support that would assist them to navigate these materials and unpack their meaning. With one-on-one support to understand the program materials, their anxiety about the nature of the program would be reduced and they would feel more confident about what they were getting into. As one participant stated, "you're not just signing up for something and you go in to do the program and it's a whole different thing." Interview participants suggested that having access to "some kind of counsellor" to match learners and programs, as well as assistance with finding information and choosing a program, would help learners find their way through institutions that are complex and mystifying.

Focus group participants thought that it was very important that potential learners understand how education will "benefit them" or "help them." One suggested that recruitment "has a lot to do with the presentation because, if they can see the worth behind it," they can "overcome the stigma." Another advised, "Create space where people have some faith, that if they just take the leap into the learning, in fact, down the road it will pay off." These perspectives suggest the importance of a human element in the recruitment process that is based on established relationships of trust. Indeed, word of mouth was considered effective because of "the personal tone to it."

However, agency representatives commiserated that they know there are many more people they're not reaching, but don't know how to reach. They used strategies of "collaborative marketing," networking with other community agencies and adding links on each other's websites.

In sum, although participants recommended that recruitment strategies should be varied and repetitive, word of mouth and human contact were the most important.

Discussion of Findings

These learners offered rich descriptions of very particular learning conditions that would enable them to restart their learning journey, including small, comfortable, encouraging, mentoring communities that rebuild confidence and hope, use experiential strategies for content and interpersonal learning, and create conditions that allow slower pacing, include a human element, involve the hands-on processing of content, and offer flexibility when life circumstances demand it. Their recommendations cohere well with the existing literature on adult learning principles and approaches, particularly holistic and experiential learning. Learners reiterated the importance of community building and peer learning, experiential and participatory learning, dialogical and socially supportive approaches, mentoring and opportunities for leadership, and program flexibility.

Clearly, the traditional classroom learning approach is not optimal for this group of learners and for some, has already been quite destructive by reproducing racism, stigma as failed learners, isolation and social exclusion. Instead, marginalized adult learners require a nurturing climate that rebuilds some competence in learning situations before they tackle learning in more institutionalized settings. Summarizing this perspective in one focus group, a participant said, "That's the difference between the institutional and the community-based approach."

At the beginning, the explicit pedagogical focus should be on social learning through more informal, relational learning in smaller and more local group settings. Incorporating more concrete, hands-on activities as well as creating less institutional and more home-like settings with more freedom of movement and possibilities for self-directedness helps to transcend negative past experiences and build more comfort in the learning process and the learning community. Activities such as field trips, playful activities, role-playing and manipulatives that allow information processing, particularly that rely on the whole body and offer a change from traditional educational settings, further solidify their learning competencies.

The participants' recommended outreach strategies echo the findings of the OECD report mentioned earlier. Word of mouth is by far the most effective outreach strategy, supplemented by a great variety of information sources and repetitiveness, so that although the message may have reached the learner previously, it reaches them again, and then again, when there are spaces in the midst of the complexity of their lives to process it. Appropriate language and language level as well as personal assistance in decision-making assist potential learners to choose the best career route with a minimum of resource wastage.

Bringing in non-Western models of learning, learning that connects individuals to their cultural roots, mother tongue, special celebrations, sacred ceremonies, arts-based activities, story-telling, and other cultural traditions not only touch the intuitive and spiritual elements in learning, but affirm the whole learner, their communities and the wisdom systems that they can draw from for sustenance. Many learners talked about finding meaningfulness within their lives

and these elements can offer points of entry to build the human spirit and resilience to the vagaries of daily life.

Many of these findings were echoed at a planning meeting held at NAIT's Aboriginal Student Centre (used with permission). Within the group discussion were included elements such as balance, spirituality, mentoring, courage, confidence, significant people, friendships, networks, mentorship, hands-on instruction, and "wrap around supports" (i.e., holistic approach). In addition were ideas of how to include the strengths of Aboriginal culture to support students and remembering the importance of understanding traditions and family backgrounds. As one participant said, "Remember the students are souls and not just numbers."

From our findings, it is clear that large institutional education providers have difficulty meeting the learning needs of many of the marginalized adults reached in this study. Indeed, several of these learners have already failed in these formal educational settings.

Given that many of these learners are still suffering and healing from learning experiences and social circumstances that have profoundly wounded them, it is equally clear that community-based agencies and organizations are essential for providing learning opportunities for marginalized adult learners. From participant descriptions of their learning environments in literacy programs, inner city drop-in centres, pre-employment programs and Aboriginal agencies, we learned that these organizations are already using program models and pedagogical practices that are effective for marginalized adult learners. These agencies and organizations provide many personalized services and supportive programs that incorporate community building, experiential learning and flexibility into their programming. Learners are already interacting with, and have relationships of trust with, these organizations and the instructors, facilitators and other agency staff. These community-based organizations can offer important insights into effective program promotion and design, as well as learner support and follow up after program completion or during a learning hiatus. Most importantly, they are enacting the process of accompaniment that all learners need.

SYNTHESIS OF FINDINGS

Having now reviewed all the finding from the literature reviews and from information collected from participants, we now identify several fundamental points that are gained from a synthesis of these findings.

Not Low-Income Adults but Marginalized Adults

Given that the explicit purpose of this study was to examine the current learning needs of low-income learners, it is important to understand two key dynamics that impact the population of low-income adults and their access to learning opportunities. A significant finding was that the term "low-income learner" does not capture the full reality of the life situations of persons with low income. Rather, the learners targeted in this study are people who have experienced the compounding effects of the economic and social trends of the past 20 years but more specifically, the boom and bust cycle of the last 5 years.

In particular, the populations we are discussing have experienced a sharp rise in living costs, some of the lowest wages in the country, increasing unemployment, the lowest rates of social assistance and higher inflation than in other provinces. With the general trend of growing poverty in Alberta over the last 20 years, these adults have significantly decreased real purchasing power, meaning that their state of poverty has deepened resulting in increased homelessness and risk of homelessness, longer working hours, more part-time and temporary jobs with no benefits, and family income losses between 9% and 20%. Whether the working poor or unemployed, almost 13% of Alberta families have food insecurity and these populations are more likely to be Aboriginal peoples, newcomer immigrant and refugee populations, young adults and women. Thus, income is not the sole source of their marginalization, rather it includes the intersection of discrimination according to race, ethnicity, gender, age, sex, religious, literacy, rurality, and citizenship status.

These populations not only have less economic power but they have less social status, cultural acceptance and political power. Thus, in this report, we call these populations "marginalized adults," those who have been excluded from the full social, economic and political benefits of citizenship in Alberta and Canada by the larger structural realities over which they have no control. They are the individuals who have been left behind in our society.

Unequal Educational Access Determined by Marginal Status

A second reality is that, since the 1980s, funding and educational programming for marginalized adults has significantly decreased, yet the expectations that all Albertans will achieve the foundational skills and levels of education necessary for participating in making Alberta's economy globally competitive has increased. Marginalized adults find themselves increasingly unable to find available and affordable programs that have the flexibility, visibility, approachability and human qualities that are needed by this group of learners. Further, although employment-related learning opportunities have expanded, marginalized adults cannot take advantage of these opportunities. Many marginalized adults are either unemployed

or work in low wage job sectors in which employers are not interested in funding further learning.

While these learners have a wide range of educational aspirations related to careers and a high level of curiosity about diverse subjects of interest, their economic status dictates against funding their own learning program, going into debt or studying while working full time. Because of their marginal position, they have much fewer financial resources available to them both for learning as well as for the supports that enable a learning program, such as child/elder care, transportation and learning materials, equipment or technology.

Further, this group of potential learners are often separated from a social network due to geography or social isolation and therefore do not have the supports to call upon when issues like family illness arise, leading to their inability to continue their studies. Because of their isolation, they often do not have the social network or other means by which they would come into contact with learning opportunities.

Often, they have had previously negative educational experiences, including racism, various forms of abuse and stigmatization that have shaped their identities as failed learners. Some of the participants recognized their position in society as the underclass. Given this, they also often lack the basic competencies and cultural capital to be successful in conventional, institutionalized learning programs.

Many newcomer immigrants are already successful and often highly educated learners, but they face a frustrating catch-22 of lacking Canadian experience, needing enhanced language abilities, and lacking funds from lack of employment to take the courses necessary to re-qualify for their credentials and enhance their language capacities.

In other words, the barriers to their learning often exist because of past circumstances as well as the precariousness of their current circumstances – including housing, job, and food insecurity. However, this does not mean that marginalized adults are not involved or interested in learning. Indeed, they are highly motivated and continuously involved in learning, but it is more likely to be in informal and incidental ways as they negotiate their daily lives.

It is time for funders and providers to recognize the importance of a broad range of important adult learning beyond employment learning, including learning related to community development, citizenship participation, Aboriginal educational autonomy, basic education, literacy, women's centers of learning, political education, volunteerism, international development, programs for the working poor as well as a wide spectrum of personal interest learning.

A Web of Intersecting Barriers

Situational, dispositional, institutional and structural barriers together are complex, multiple and intersecting like a spider's web that enmeshes marginalized adults. As a package, they are overwhelming and continuous.

For instance, adults with low income need to take public transportation, they have limited resources and often a small or unsupportive social network with which to cope with issues as they arise, they often live in substandard and unsafe housing conditions, and have complex

responsibilities, often as parents. Within such a framework, if a child becomes ill or another problem occurs, it often takes more time and effort to resolve, especially when travelling to multiple locations by public transportation. This makes them appear negligent in attendance or promptness and often results in penalties from an instructor or institution. Previous learning problems may include physical and mental illness, lack of literacy or limited English language skills that further impede their successful educational completion. Lack of appropriate settings for study, insecure housing and the challenges of cultural adaptation are all contributing factors to lack of success. Finally, the stress of juggling expenses and job issues on top of all the family responsibilities can reach overwhelming proportions that impact personal health and wellbeing.

Predictably, these individuals reach a tipping point – the point at which just one more stressor enters the scene, sometimes traumatic such as a family death or loss of a partner to jail or separation, but sometimes it is the snowballing of a number of issues, including abuse, illness of self or family member, addictions, mental illness, inflexible work schedules, children with special needs or an unexpected bill. An already tenuous situation becomes disastrous for adults and families already coping with multiple challenges. Of course, these individuals put their families, their health and employment first over study, as most people would. Such intersections between these "situational barriers" require responses from educational institutions that recognize the precariousness of the circumstances and the predictability of the tipping points.

Wounded Learners

Canadian-born adults who are marginalized are highly likely to be wounded learners. School experiences of failure have left many Albertans scarred and afraid of returning to any kind of formal education. This personal learning history generates a complex set of emotions – fear, discouragement, lack of confidence and intimidation – that function as barriers to learning. These emotions are augmented by other lived experiences such as physical or mental illness, abuse, age, racism, discrimination, devaluing of credentials from another country, and the competitive climate in the educational system. This woundedness has been lodged in their sense of self and thus is part of their identity as a failed or incompetent learner. Along with other factors, early schooling helped to generate the experience of social and academic exclusion. Yet, not returning for further education continues to reproduce this exclusion. When learners do return, especially to large bureaucratic educational institutions, negative early experiences are often repeated, making successful completion unlikely.

These learners have been failed by a system that operates on values of efficiency, uniformity, discipline and regulation. Shame, depression, discouragement, and sometimes despondency are the result. Some learners describe a wall that separates them from educational engagement, exacerbated by age. Overall, many of these learners express a sense of resignation and thus a lack of preparedness for engaging with institutional-based learning. To surmount this "wall," they need extra emotional, social, and intellectual supports to generate the energy and direction required to restart a new learning journey. While these are often identified as dispositional barriers, they actually have situational, institutional and structural origins.

Building Social and Cultural Capital for Accessing Learning

As the participants so clearly expressed, re-entry learning experiences are best provided by community-based organizations and non-formal learning programs that can help transform their existing identities of failure, build the emotional, social and intellectual readiness for learning, foster basic competencies required for formal education, and assist them in transitioning into more institutionalized learning opportunities. Community building and mentoring are the antidote to alienation and exclusion that build capital often through informal learning.

In other words, these learners need to acquire the cultural and social capital to support their learning journeys, including social networks that will support them both with tangible resources when issues occur as well as moral support. Learners can see these forms of capital modeled in community-based organizations, and the relations they develop there reduce isolation and feelings of exclusion. Learning these forms of capital should not obliterate their cultural, gendered or other unique forms of expression. Rather, learners can be guided in using their unique histories for learner success.

Widening the Circle of Pedagogical Practices

As part of a pedagogy of social inclusion, it is important to widen the circle of the adult education community in a way that includes the ways of knowing, ways of learning and ways of being of marginalized adults. Holistic learning that reaches the six dimensions was repeatedly mentioned by the participants as central to fostering a healing process, to regenerating the energy and confidence necessary for educational engagements, to inspiring their aspirations and intellectual capacities, and to building relational skills. Community building among learners also builds the social capital that is required for long term educational success.

Experiential and participatory learning were identified as most effective for scaffolding their learning from the concrete to more abstract and for leveraging their learning through peer learning, field experiences and job shadowing. Engaging learners in transforming their identities of failure to identities of success through critical reflection on their learning autobiographies and problem-posing about their social position is often profoundly effective. Finally, ensuring that non-Western perspectives are integrated into teaching and learning activities, from storytelling to arts-based activities to sacred ceremonies, is essential for many populations of marginalized learners.

Community-Based Organizations, Not Institutions, are Ready for Marginalized Learners

It is abundantly clear that marginalized learners require small, comfortable, nurturing environments where they are personally known, where the complexity of their lives is understood, and where one-on-one assistance through moral support, counselling and mentoring is provided. This is the first step in getting ready for structured learning experiences, where their fear, intimidation, shame, and anxiety are transformed into confidence, belief in self and an identity as a successful learner.

With their smaller size and accessible locations, community-based organizations, more than institutional education providers, exemplify the practices of flexibility, slower pace of instruction and assignments, and accommodation for precarious life circumstances that these marginalized learners require.

Community-based organizations are often the locus where learners come into contact with information about further learning opportunities and learners look to instructors for program advice within a trusting relationship. Most importantly, these organizations enact the process of accompaniment that all learners need.

Support Community-based Organizations to Fill Service Gaps

It was clear from the interviews with learners and the focus groups with the community-based organizations – whether literacy programs, inner city drop-in centres, pre-employment programs, immigrant and refugee-serving agencies, or Aboriginal agencies – that they are the success-enabling communities for marginalized learners. Building this kind of learning community, in partnership with larger institutional providers, is a return to historic University Extension models that took non-formal learning opportunities out into communities.

However, there is a gap in services for these learners when there is little explicit development of transitioning programs, competition instead of collaboration between providers driven by limited funding sources, and lack of stable core or infrastructure funding. Community-based organizations need adequate resources to move beyond project-based funding to develop long-term, stable, well funded programs that can meet the needs of these learners in legitimated and appreciated ways.

RECOMMENDATIONS

In this research project, we have explored the social, economic and policy context in Alberta, as well as the needs, barriers and pedagogical practices of marginalized adults in Edmonton. Notwithstanding considerable policy and program efforts to provide educational resources and support to disadvantaged learners, this project has revealed significant gaps in the system of educational policies and services for marginalized adults.

To redress these gaps and maximize access for marginalized adults, we offer recommendations for government policy-makers, institutional providers and community-based programs. We also make recommendations for further research.

Recommendations for Government Policy-makers

Commentary: Governments have an important role to play in ensuring equitable access to educational opportunities for all learners. In Edmonton, all three levels of government (federal, provincial and municipal) have policies that are aimed, specifically or tangentially, at marginalized adults. Further, those policies and programs have a direct impact on the vast network of community-based service providers.

Policy frameworks provide the direction upon which funding decisions are made throughout the entire system of services. Marginalized adult learners are affected by government policy in matters that relate not only directly to education but to all manner of other social support systems as well.

In order for marginalized adults to successfully negotiate non-formal and formal educational opportunities, it is essential that their marginalized status in society and their complex life circumstances be considered in policy-making. For many years, service users and service providers in programs that address addictions, mental health, abuse, homelessness, literacy and poverty have advocated for a holistic approach to services that recognizes the multiple barriers and complex lives of marginalized adults.

Our findings support this type of approach to service. Therefore, a series of our policy recommendations are related to the need for a holistic and comprehensive approach to the learning needs of marginalized adults.

Recommendation #1

We recommend continued emphasis on cross-ministry initiatives that tackle issues of marginalization and exclusion through the collaborative efforts of the ministries and departments responsible for social services, children's services, justice, education, advanced education, health, addictions and mental health.

Recommendation #2

We recommend that government policies and programs diligently work to improve the social support structures that are required for marginalized adults to be successful. For example,

- Increase affordable quality child care spaces and subsidies
- Provide more funded time in ESL programs
- Increase income support programs that allow people to live dignified lives in which it is a real possibility for learners with complex life circumstances to move forward with their educational goals
- Increase minimum wage
- Develop a collaborative PLAR system
- Advance Credential Assessment programs and fast track Accreditation programs
- Develop more initiatives and subsidies for safe, affordable housing
- Provide incentives for employer funding of learning programs
- Offer more generous and flexible student loan programs
- Reduce tuition rates
- Institute living wage legislation
- Provide transportation supplements
- Initiate incentives for employers to develop "good jobs" i.e., more stable, permanent jobs with benefits

Recommendation #3

We recommend that policy-makers act on OECD recommendations and take the lead in fostering a pan-Canadian discussion of lifelong learning in order to develop a comprehensive national lifelong learning policy that is holistic and much broader than employment concerns.

Recommendation #4

We recommend that learning outcomes be defined more broadly than the current emphasis on economic/employment outcomes. As demonstrated in our findings, this population of learners struggles with multiple barriers that impact their availability and ability to work. Learning that relates to general wellbeing, secure housing, nurturing relationships, life skills, self-esteem and confidence, as well as new skills of all kinds enhance the quality of life for citizens and contribute to society as a whole. Often, these kinds of goals are an essential part of the learning landscape both as a bridge to institutionalized learning but also as goals unto themselves.

An exemplary program is DECSA's Opportunity Plus program. Developed for women who have left an abusive relationship, the program's objectives include learning the skills and getting the supports that are required to become self-sufficient in all areas of life.

Commentary: Grassroots, community-based agencies and organizations are doing outstanding work despite limited resources and funding policies that encourage competition for short term, project-based funding. Even in such a climate, agencies are working collaboratively, sharing resources and struggling together to provide the continuum of services that are needed for marginalized adults. An excellent example is the collaborative comprehensive network of services that are provided in Abbottsfield Mall in northeast Edmonton.

Recommendation #5

We recommend that government policy aim to strengthen grassroots initiatives by ensuring long term operational funding for community-based agencies and by promoting collaboration by reducing competition for limited funding options. This would be a strategic investment in innovation for a large segment of Alberta's population that is currently excluded from full social, economic, and political participation.

Commentary: Although marginalized adults are affected by the economic booms and busts, they are more deeply affected by economic and social policy that inadvertently or deliberately creates an underclass in the economic landscape of Alberta. Working at the front line, agencies and organizations that work with marginalized adults witness the cracks in the system – cracks that have grown ever larger in the political-economic conditions that were introduced in the 1990s. A vibrant democratic society requires the advocacy and activist work of its voluntary sector and social movements to bring to light the cracks in the system and advocate for changes that would sincerely address these issues. Advocacy and activist work should be regarded as essential to a democratic political process and funding should not be limited due to this vital contribution in society.

Recommendation #6

Reconsider advocacy (lobbyist) restrictions for non-profit agencies who are at the front line of dealing with the fall-out from economic and social policies.

Commentary: Our findings clearly affirm that marginalized adults are not self-seeking, individualistic learners with narrow learning goals. Rather, they have a range of learning interests that include a keen sense of the importance of history, economics and politics at micro and macro levels. They want to learn to advocate for themselves better, help others with similar needs, and they want a better society for everyone. Agency workers agree: Important life skills are learning how to negotiate complex institutional systems and to develop citizen participation skills.

One such innovative initiative is Humanities 101, a community-based outreach program that aims to empower adult learners to use critical thinking in everyday life and inspire a passion for lifelong learning while pursuing learning in various disciplines. The program is offered to marginalized adults by the University of Alberta in collaboration with Boyle Street Community Services and the Learning Centre Literacy Association. This initiative, started a number of years ago, has now spread throughout North America, although sometimes with a different name.

Recommendation #7

We recommend that government policy support the active inclusion of marginalized adults in policy-making that affects them and encourage program initiatives in civic education that would help them obtain the skills to do so.

Commentary: Finally, policy language should reflect the reality of the systemic marginalization and exclusion faced by this population and avoid wording that implies individual blame for social circumstances that are structural barriers over which they have no control.

Recommendation #8

We recommend that governments reframe the language used to describe and define marginalized adult learners in a way that recognizes their enmeshment in a system that, in many ways, structurally disadvantages them.

Recommendations for Institutional Providers

Commentary: There are a variety of institutional providers in Edmonton that contribute to the network of educational service provision. This project was commissioned by NorQuest College (as one of the sponsors) to contribute to program planning in their new role as a Comprehensive Community Institution (CCI). Although our recommendations for institutional providers are aimed primarily at NorQuest as the Edmonton region's CCI and a sponsor of this project, the recommendations are equally relevant for other CCI's in other communities and other institutional postsecondary providers. The mandated collaboration between the CCI's and community-based adult education providers offers an excellent opportunity to actualize recommendations based on the findings of this research. The findings clearly indicate three roles for CCI's relative to community-based adult education.

Recommendation #1

We recommend that institutional providers, particularly the Comprehensive Community Institutions, work in partnership with community-based organizations to develop a continuum of educational services that includes the following:

- Provide support **to** community-based programs
- Move resources (materials, staff, content) **into** the community
- Develop bridging/transitional programs **from** the community to institutions

Note: This should not be visualized as a ladder that all learners would be expected to climb. Rather, each part of the continuum is equally valid and rich in pedagogical potential unto itself. Conversely, it is important not to inadvertently create learning ghettos that discourage learners from moving into institutionalized educational settings, but instead to develop a varied and rich landscape of opportunities dependent on needs and interests.

Commentary: The findings loudly proclaim the critical importance of flexible policies and pedagogies that will support and empower learners to succeed. Complex life circumstances and social situations are a predictable outcome of marginalization and exclusion. Learners will bring

this mix of stressors and strains with them into the learning environment and tipping points will occur. Institutions must be ready for the realities of marginalized learners' lives. Educational programs for marginalized adults will operate more successfully under the philosophy of fixed outcomes and variable timelines rather than fixed timelines which breed variable outcomes. The preferred approach implies that success will be the outcome for all learners but that the time and routes it takes to achieve success will vary. Finally, this research supports a diversity pedagogical practices and strategies for marginalized adults that are consistent with many years of studies and recommendations on adult education principles and approaches.

Recommendation #2

We recommend policies and programming that provide for maximum flexibility in the following areas:

- Time related to attendance and completion
- Provision for interruptions in programs
- Outcomes that include, but are not limited to, employment and academic achievement
- Accommodating and providing support structures for life circumstances
- Systems of support that include systematic outreach before, during & after programs

Recommendation #3

We recommend programming that includes the following approaches:

- Leadership and mentoring opportunities
- Community-building
- Experiential and participatory learning
- Holistic and Indigenous pedagogies
- Group dialogue and peer learning
- Field experiences and job shadowing
- Civic education
- Building networks with community-based providers that are a conduit for varied and repetitive program information

Recommendations for Community-based Programs

Commentary: Our findings strongly support the work of the many and varied community-based organizations in Edmonton. They demonstrate an astute awareness of the needs, goals and life circumstances of their clients and, for the most part, are actualizing the kinds of learning environments and approaches that are recommended. They are particularly adept at engaging people through community-building and experiential learning but, most important is

their extreme flexibility in adapting to the life circumstances of marginalized adults that is life-affirming and success-inducing. Nonetheless, there are pedagogical approaches that could be strengthened, including those that engage learners as citizens and those that are drawn from non-Western models.

Recommendation #1

We recommend more attention to the following approaches within community-based learning contexts:

- Political/civic education that empowers learners through a critical understanding of the systems that govern their lives and develops skills in advocacy and activism for political participation to improve the conditions of their lives
- Indigenous and other non-Western learning philosophies and models that are relevant and supportive for all learners

Commentary: As mentioned above, community-based agencies and organizations are already collaborating but within a climate of competition for limited resources.

Recommendation #2

We support continued efforts at collaboration among community-based organizations and active efforts to disrupt the competitive model imposed by funders.

Commentary: Education is only one factor in a web of social, health and economic needs. Marginalized adults use a variety of services and often grow comfortable in places that are welcoming and familiar. For example, many marginalized adults visit Boyle Street Community Services daily where they have built a community of support. Therefore, it makes sense to offer literacy programs, such as those at the Learning Centre, in that environment. Similarly, newcomer immigrants visit Millwoods Welcome Centre for support and counselling making it an excellent location for ESL classes.

Recommendation #3

We support the "one stop shop" approach to service provision wherein multiple services are available in accessible community locations and service providers are working within spaces that potential learners are already visiting.

Commentary: Finally, it is critical that grassroots agencies, that are working directly with marginalized learners in the spaces of their lives and between the cracks of the system, continue to play a healing and an advocacy role as they accompany their clients on their life and learning journeys.

Recommendation #4

To support their healing and advocacy work, we recommend that community-based agencies and organizations:

- Work to re-establish their pivotal advocacy role within civil society

- Develop initiatives, in partnership with other educational partners, that will help learners scaffold into institutionalized settings
- Foster outcomes that include social and cultural capital for re-engaging in a learning journey
- Champion initiatives that provide emotional and moral support, counseling, program guidance and mentoring
- Use word of mouth and direct contact to reach more isolated and marginalized adults who might benefit from their services

Recommendations for Further Research

Commentary: As with any comprehensive research project, the research team uncovered many questions that require much more systematic study than could be addressed here. Also, given the limitations of the study, we suggest targeted research attention in areas and populations that we were unable to reach.

Recommendation #1

While our reach into newcomer immigrant communities was not vast, a significant amount of other research has been done over the past 20 years that has consistently recommended policy changes that have yet to be implemented. We do not recommend that more primary research be conducted in the newcomer immigrant community.

Rather, we recommend (a) that a review and summary of all the recent research and recommendations be conducted and (b) that more concerted attention be directed to refugee communities in Edmonton.

For the latter, we suggest drawing upon networks in the ethnic community associations and groups that have high numbers of refugee members, and conducting open-ended interviews with trusted members of the community.

Recommendation #2

We recommend more attention to the investigating the learning needs, goals, lived realities and barriers of persons with disabilities, a group that we were unable to reach in this project.

Recommendation #3

We recommend a supplementary report that addresses the literature on best practices for specific groups and exemplary community-based models alongside the research findings on pedagogical practices and sites of learning programs in Edmonton.

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APPENDICES

Organizations Contacted

Organizati on Name	Organizati on Name	Organizati on Name
AADAC	Edmonton Food Bank	Edmonton Immigrant Men Support Network Society
ABC Headstart	Edmonton Immigrant Men Support Network Society	Edmonton Immigrant Services Associati on (EISA)
Aboriginal Consulti ng Services Assoc of Alberta	Edmonton Immigrant Services Associati on (EISA)	Mustard Seed
Acti on for Healthy Communiti es	Edmonton Insti tuti on for Women	Mustard Seed
Apprenti ceship Board	Edmonton John Howard Society	Mustard Seed
ASSIST Community Services Centre	Edmonton Mennonite Centre for Newcomers (EMCN)	Norwood Child and Family Resource Centre
ASSIST Community Services Centre	Edmonton Public Schools	Operati on Friendship Seniors Society
ASSIST Community Services Centre	Edmonton Remand Centre	OPTIONS Sexual Health Associati on
Ben Calf Robe Society	Edmonton Seniors Centre	Oteenow Employment Centre
Bent Arrow Traditi onal Healing Society	Elizabeth Fry Society	PAAFE
Bissell Centre	Fort Sask Remand Centre	Poundmakers Lodge Treatment Centre
Boyle Street Community Services Centre	Hope Mission Herb Jamieson Centre	Poverty in Acti on
Boyle-McCauley Health Centre (BMHC)	Hope Mission Women's Services	Project Adult Literacy Society (PALS)
Candora	Hope Mission Women's Services	Prosper Place Clubhouse
Candora Society	Hope Mission Women's Services	Red Road Healing Society
Cath. Social Services Jasper Ave Complex Program	House Next Door Society	SAGE Safe House
Catholic Social Services Central Offi ce	Housing Support Services Hub	SAGE: Seniors' Associati on of Greater Edmonton
Catholic Social Services South Offi ce	Immigrati on & Sett lement Service (CSS)	Salvati on Army- Addicti on & Residenti al Centre
Changing Together	Indo-Canadian Women's Society	Salvati on Army Community Services
Chrysalis	Jasper Place Health and Wellness	Salvati on Army Divisional Services
City Centre Educati on Partnership, Eastwood School	Jewish Family Services	Spirit Keeper Nati ve Friendship Centre
City of Edmonton; Community Services	Jewish Family Services	The Family Centre
DECSA	KARA Family Resource Centre	The Family Centre
Dickinsfi eld Amity House	KARA Family Resource Centre	The Family Centre
E4C	KARA Family Resource Centre	The George Spady Centre
E4C	La Salle Residence	Uncles and Aunts at Large
E4C	l'Associati onmulti culturelle francophone de l'Alberta	Unity Centre of Northeast Edmonton
E4C	Learning Centre Literacy Associati on	Urban House
E4C	Learning Centre Literacy Associati on	WeCan
E4C	Literacy Alberta	Wellspring Program for Women at Hope Mission
E4C	Lurana Shelter	WIN House
E4C	Mediati on and Restorati ve Justi ce Centre	Wings of Providence Society
E4C	Meti s Associati on	YMCA
E4C	Meti s Child & Family Services Society	YWCA Counselling Centre
E4C	Mill Woods Family Resource Centre	Norwood Child and Family Resource Centre
ECALA	Multi cultural Coaliti on	Operati on Friendship Seniors Society
Edmonton Family Violence Treatment Educati on & Research	Multi cultural Coaliti on	OPTIONS Sexual Health Associati on
Edm. Catholic Schools: Alternati ve & Adult Ed.	Multi culturaHealth Brokers Cooperati ve	Oteenow Employment Centre
	Multi cultural Health Brokers	PAAFE

Survey Tables

Motivation for Participating in the Past	Female	Male	Count	%
To feel better about myself/more confident	18	17	35	33.0%
To learn a new skill	21	13	34	32.1%
To find a job	7	20	27	25.5%
To be better able to stand up for my rights	9	10	19	17.9%
To have better relationships	9	8	17	16.0%
To learn how to better manage money	9	8	17	16.0%
To find a better job	10	7	17	16.0%
To meet a requirement	4	6	10	9.4%
To improve my parenting skills	7	2	9	8.5%
To learn English	6	1	7	6.6%

Reason for Participating in the Future	Female	Male	Transgen	Count	%
To learn a new skill	22	16	0	39	36.8%
To feel better about myself/more confident	20	17	1	38	35.8%
To find a better job	20	13	0	33	31.1%
To learn how to better manage money	15	13	0	28	26.4%
To find a job	10	17	0	27	25.5%
To have better relationships	12	13	0	25	23.6%
To be better able to stand up for my rights	12	10	0	22	20.8%
To meet a requirement	7	10	0	17	16.0%
To improve my parenting skills	10	6	0	16	15.1%
To learn English	5	1	0	6	5.7%

Types of Future Programs	Count	%
Computer skills	41	38.7%
Career advancement	39	36.8%
Budgeting/money management	30	28.3%
Life skills	25	23.6%
Leadership skills	24	22.6%
Public speaking	23	21.7%
Communication skills	22	20.8%
Literacy/upgrading	21	19.8%
Arts/crafts	21	19.8%
Relationships/boundaries	21	19.8%
Job search skills	17	16.0%
Another language	17	16.0%
Recreation/exercise	17	16.0%
Music	17	16.0%
Living skills/cooking	16	15.1%
Anger management	16	15.1%
Carpentry/woodworking	15	14.2%
Assertiveness	15	14.2%
Gardening	12	11.3%
Parenting	8	7.5%
Legal Aid	8	7.5%
Caring for aging parents	6	5.7%
English as a Second Language	4	3.8%

Types of Barriers	Female	Male	Transgen	Count	%
Transportation	18	15	1	34	32.1%
Too expensive	14	14	0	28	26.4%
Not enough funding	14	14	0	28	26.4%
A lack of time	15	10	0	25	23.6%
A lack of information	13	8	0	21	19.8%
Feeling intimidated or nervous	11	8	0	19	17.9%
Not enough support	8	10	0	18	17.0%
Physical health concerns/disability	4	9	0	13	12.3%
Past negative school experiences	7	5	0	13	12.3%
Course location is a problem	7	5	0	12	11.3%
Lack of confidence	4	8	0	12	11.3%
Multiple responsibilities	6	5	0	11	10.4%
Learning difficulties	3	7	0	10	9.4%
Don't have the courses I need	6	4	0	10	9.4%
Child care issues	3	5	0	8	7.5%
Find groups stressful	1	7	0	8	7.5%
Inadequate language skills	3	5	0	8	7.5%
Negative attitudes toward adult learners	3	5	0	8	7.5%
Mental health concerns	1	6	0	7	6.6%
Course times are not suitable	4	2	0	6	5.7%
Difficulties reading and writing	2	4	0	6	5.7%
Elder care issues	1	2	0	3	2.8%

Research Documents

Date: June/July 2009

Project: Determining the needs, gaps, barriers and best practices for developing learning opportunities for low income adults in the Edmonton Capital Region

Dear Community Representative

Thank you for your interest in participating in this research study.

The purpose of this study is to identify the learning needs, gaps barriers and best practices of low-income adults in the Edmonton Capital Region. This project is being conducted by a team of researchers in the Department of Educational Policy Studies at the University of Alberta under a contract with the project sponsors NorQuest College and Edmonton Community Adult Learning Association (ECALA). Findings will be used to guide the educational programming of the project sponsors and to contribute to the academic literature on marginalized learners.

We have asked for your assistance in three aspects of this study.

Participate in a focus group

We have invited you to participate in a focus group for approximately 1.5 hours. First, we will gather some written information about the work of your agency or organization and obtain your consent to participate in the study. Then, the facilitator will pose a series of questions for group discussion related to the challenges, learning needs and opportunities for low-income learners in the Edmonton Capital region.

Your participation is completely voluntary. You may choose to participate in the discussion related to some or all of the questions. You may also change your mind later and request that we take some or all of your information out of the study. However, we are only able to remove information up until we are finished with focus groups and interviews.

We will keep all the information confidential. We ask that you also respect the confidentiality of the information presented in the focus group by not discussing it outside the session. The session will be audio recorded.

Only the research team at the University of Alberta will have access to the information from the focus group. We will secure the information through passwords and secure servers at the University of Alberta and in locked cabinets. In the report, we will identify which agencies participated in the focus group. However, we will not use your name or personal information.

Contact with potential interviewees

Another method of gathering information for this study is to talk directly to low-income adults. (See

definition of "low-income).* For this, we need your assistance because you have the best knowledge and good relationships with the people that you work with. This process will involve the following steps:

1. Using a script that we will provide that describes the research project, you will contact a few low-income adults who you believe might be interested in being interviewed for the study during June or early July. Note: We are able to provide interpretation services to a few non-English speakers.
2. For those that are interested, you will document verbal consent to provide us with their name and contact information. For those with no phone or email address, you will make an appointment for us to meet them.
3. Be sure that potential participants are assured that their participation is completely voluntary and that it is in no way connected to the services of your agency or organization.
4. Provide us with the contact information or appointment date/time/location.

Learner surveys

We will also be administering short surveys to some low-income adults. The quickest way to find enough potential participants for this task is to administer the survey in existing groups meeting over the month of June or early July that might be willing to do a 15-minute survey. If you have such a group, we would appreciate an opportunity to come to the group and administer the survey. The survey will use clear and non-intrusive language and we are happy to provide assistance to participants with language or literacy challenges.

Your participation in any aspect of the study will be invaluable.

When the study is completed, we will write a final report for the project sponsors. We may also make presentations or write papers about this study.

The plan for this study has been reviewed for its adherence to ethical guidelines and approved by the Faculties of Education, Extension, Augustana and Campus Saint Jean Research Ethics Board (EEASJ REB) at the University of Alberta. For questions regarding participant rights and ethical conduct of research, contact the Chair of the EEASJ REB at (780) 492-3751.]

If you have any other questions about the study, please contact us (see below) or the Chair of Educational Policy Studies, Jose Da Costa at jose.dacosta@ualberta.ca or 780-492-5868.

Thank you very much for your assistance in improving learning services and access for low-income adults in the Edmonton Capital region.

Sincerely,

Donna Chovanec and Elizabeth Lange
Assistant Professors
Educational Policy Studies, University of Alberta

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* We are using the Low Income Cut Off (LICO) for a family of three living in Edmonton - $26,095/yr. However, you do not need to know the family's exact salary in order to refer them for the study.

Date: June/July 2009

Project: Determining the needs, gaps, barriers and best practices for developing learning opportunities for low-income adults in the Edmonton Capital Region

Dear adult learner

Thank you for helping us with this research study. The purpose of this study is to find out about your learning needs. The people who teach adult education at the University of Alberta are doing this study for NorQuest College and Edmonton Community Adult Learning Association. NorQuest and ECALA want to do a better job of meeting your learning needs.

My name is _____. I am working at the University of Alberta. I would like to talk to you for one hour. First, I will ask you for some information about yourself. For example, your age and how much schooling you have. Then, I will ask you some questions about your learning experiences and needs as an adult. If you agree, we will use a tape recorder to help us remember the details of what you tell us.

Only answer the questions that you feel comfortable answering. You don't have to give me any information that you would rather keep private. You can also change your mind later and ask me to take some or all of your information out of the study. I can take your information out but only until we stop getting information from everyone who is helping us with this study.

Participating in this study has nothing to do with the person or agency that told you about this study. We will not give any information to the person who told you about this study.

We will pay you a small amount to thank you for your time. If you have to pay a babysitter or take the bus, we can help you with those costs.

We will keep all your information private. Only the research team at the University of Alberta will know what you tell me. They must all sign a letter that says that they will keep your information private. We keep your information safely in our computers and in a locked cabinet. Your real name is not on any files. We will destroy your personal information when we finish the final report.

We will write a final report for the people who asked us to do this research. We might also make some presentations or write some papers about this study so that more people will learn how to meet the needs of adult learners better. We will never use your name or any personal information about you.

At the University of Alberta, we must prove that we are being careful and honest about how we treat you in this study. We also have to take good care of the information that you give us. If you have any questions about this, you can contact (780) 492-3751. If you have any questions about the study, you can contact my supervisor Donna Chovanec at 780-492-3690.

Thank you.

Research assistant name _____

Phone number 780-492-7609 or _____

ECALA Project: Guide for Interviews with low-income adults (1 hour)

Date and location _____

Pseudonym/Code _____

Interviewer(s) _____

Introduction

- Introduce self.
- Carefully review Information Letter (see attached).
- Answer all questions.
- Obtain consent.

Consents

Consent to participate? YES ☐ NO ☐

Consent to audio record? YES ☐ NO ☐

Demographic information (to be collected sensitively and only as appropriate)

Age and year of birth	
Gender	
Racial and/or ethnic identity	
First language	
Marital status	
Parental status	
Educational background	
Income level	
Employment status	
Neighbourhood	
Service and support agencies used	

Interview tips for the interviewer

- The following questions are a **guide** to help focus the interview on the purpose of the study.
- Each sub-heading identifies a focus area. Under each subheading are possible questions that can be used to encourage the interviewee to speak about this area. **Adapt** the questions and use as many **prompts** as needed to get a full response before moving on. Good prompts are:
    - Can you tell me more about that?
    - Could you give me an example?
    - Do you have any other examples?
    - Can you describe when something like that happened to you?
    - Could you walk me through that experience? What happened first? Next?
    - What does _____ mean to you?
- **Let people talk!** Sometimes an interviewee will talk about all our topic areas without being asked – if we just listen.

Questions

1. **Learning experiences**
    - What kinds of things do you enjoy learning? Where do you learn them?
    - What kinds of learning do you do? Where?
    - What kinds of learning activities have you participated in during the past few years?
    - **Prompt** for the interviewee's own understanding of "learning" and "learning activities." Listen for how they are using the term, use prompts to get a full understanding of their meaning, and then prompt for other kinds of learning/learning activities (e.g., formal, non-formal, informal). (*Read supplementary information for background on this topic.)*

2. **Barriers to learning**
    - What things make it difficult for you to learn these things?
    - What things make it difficult to participate in learning activities?
    - **Prompt** for dispositional, situational, institutional and structural barriers if needed. Be sure to use accessible language, drawing on their own examples and experiences. *(Read supplementary information for background on this topic.)*

3. **Learning goals/needs**
    - What kinds of things would you like to learn about?
    - What are your preferred methods and places of learning?
    - Final question: **What message would you like to send to people who provide learning opportunities?**

ECALA Project: Guide for Focus groups with community agencies and organizations serving low-income adults (1.5 hours)

Date and location _____

Facilitator _____

Recorder _____

Consent to audio record (check forms before starting) YES ☐ NO ☐

Introduction

Introduce facilitator and recorder.

Thank you for coming this evening. We have invited you to participate in this focus group for approximately 1.5 hours. First, we will gather written information about the work of your agency or organization and obtain your consent to participate in the study. Then, I will pose a series of questions for group discussion related to the challenges, learning needs and opportunities for low-income learners in the Edmonton Capital region.

Your participation is completely voluntary. You may choose to participate in the discussion related to some or all of the questions. You may also change your mind later and request that we take some or all of your information out of the study. However, we are only able to remove information up until we are finished with focus groups and interviews.

We will keep all the information confidential. We ask that you also respect the confidentiality of the information presented in the focus group by not discussing it outside the session. The session will be audio recorded (if everyone has consented).

Only the research team at the University of Alberta will have access to the information from the focus group. We will secure the information through passwords and secure servers at the University of Alberta and in locked cabinets. In the report, we will identify which agencies participated in the focus group. However, we will not use your name or personal information.

Are there any questions?

Background information and consent (gathered on a separate form for each participant)

Questions

- How would you define a "low-income adult learner"?
- What are the particular challenges faced by low-income adults in the Edmonton region at this time?
- What are the particular challenges in reaching low-income adults regarding learning opportunities?
- Presently, how do low-income adults find out about learning opportunities?
- What kinds of educational opportunities would assist learners in addressing their challenges?

July/August 2009

Dear adult learner

Thank you for helping us with this survey.

We are from the University of Alberta. We are doing this survey for NorQuest College and Edmonton Community Adult Learning Association. NorQuest and ECALA want to do a better job of meeting your learning needs.

The purpose of this survey is to find out about your learning needs. The survey will take about 15 minutes to complete. The survey is anonymous. That means that your name is not on the survey so, we won't know who did it.

You may choose to do the survey or choose not to do the survey. It is completely up to you. This survey has nothing to do with the group or class that you are attending at this agency. We will not give any information to the people who work at the agency.

We will write a final report for the people who asked us to do this research. We might also make some presentations or write some papers about this study so that more people will learn how to meet the needs of adult learners better. We will never use your name or any personal information about you.

At the University of Alberta, we must prove that we are being careful and honest about how we treat you in this study. We also have to take good care of the information that you give us. If you have any questions about this, you can contact (780) 492-3751. If you have any questions about the study, you can contact our supervisor Donna Chovanec at 780-492-3690.

Thank you.

Research assistant name(s) _____

Phone number 780-492-7609

Learning Needs Survey

1. **How would you describe yourself?**
   a. Male
   b. Transgender
   c. Female
   d. Other _____
2. **How old are you?**
   a. 18-30
   b. 31-42
   c. 43-55
   d. 56-64
   e. Over 64
3. **What is your marital status?**
   a. Single
   b. Common-law / Married
4. **Do you have any young children (under 18)?**
   a. Yes
   b. No
5. **Do your young children live with you?**
   a. Yes
   b. No
6. **Do you have any adult children (over 18)?**
   a. Yes
   b. No
7. **Do your adult children live with you?**
   a. Yes
   b. No
8. **Into which category would you place your total household income?**
   a. Less than $20,000
   b. $20,000 to $40,000
   c. More than $40,000
9. **What is your first language?**
   a. English
   b. French
   c. Other (please specify) _____
10. **Where were you born?**
    a. Canada
    b. Another country_____
11. **If you were NOT born in Canada, when did you first arrive? Year: _____**
12. **How would you describe your ethnic origin? _____**

13. What is your highest level of education?

a. Completed Grade 6
b. Completed Grade 9
c. Completed Grade 12
d. Completed a trade ticket
e. Completed a non-university certificate or diploma
f. Completed a university degree
g. Other _____

14. What is your current employment status? Please circle all that apply

a. Employed full time
b. Employed part-time
c. Employed seasonally
d. Self-employed
e. Student
f. Retired
g. Unemployed and seeking work
h. Not currently seeking work
i. On social assistance/AISH
j. On disability insurance
k. Other _____

15. What is/are your current job(s)? _____

16. Which neighbourhood/s do you live in? _____

17. Have you used any services offered by agencies or community organizations?

a. Yes
b. No

18. Which agencies or community organizations have you found helpful?

19. In the past few years, what kinds of classes, programs or activities have you participated in?

20. Where did you attend these classes, programs or activities that you participated in?

Please circle all that apply

a. At an agency or organization
b. In a library
c. At a community college
d. At a university
e. Other _____

21. In the past, what motivated you to participate in these classes, programs or activities?

Please <u>circle all</u> that apply

a. To find a job
b. To find a better job
c. To learn English
d. To improve my parenting skills
e. To learn how to better manage money
f. To learn a new skill
g. To have better relationships
h. To feel better about myself/more confident
i. To be better able to stand up for my rights
j. To meet a requirement
k. Other _____

22. Would you like to participate in classes, programs or activities in the future?

a. Yes
b. No

23. What are some of your reasons for wanting to participate in classes, programs or activities in the future?

Please <u>circle all</u> that apply

a. To find a job
b. To find a better job
c. To learn English
d. To improve my parenting skills
e. To learn how to better manage money
f. To learn a new skill
g. To have better relationships
h. To feel better about myself/more confident
i. To be better able to stand up for my rights
j. To meet a requirement
k. Other _____

24. What are your preferred places of learning? Please <u>circle all</u> that apply.

a. At home
b. At an agency or organization that I am familiar with
c. At any agency or organization
d. At a college
e. At a university
f. Other _____

25. In the future, what kinds of classes, programs or activities would you like to participate in?

Please <u>circle all</u> that apply.

a. Career advancement
b. Job search skills
c. Computer skills
d. English as a Second Language
e. Another language
f. Literacy/upgrading
g. Budgeting/money management
h. Parenting
i. Caring for aging parents
j. Life skills
k. Legal Aid
l. Living skills/cooking
m. Gardening
n. Arts/crafts
o. Carpentry/woodworking
p. Recreation/exercise
q. Music
r. Anger management
s. Communication skills
t. Leadership skills
u. Assertiveness
v. Public speaking
w. Relationships/boundaries
x. Other _____

26. Have you encountered any difficulties or barriers when participating in, or trying to participate in learning programs/activities?

a. Yes
b. No

27. What kinds of difficulties or barriers have you encountered when participating in, or trying to participate in learning programs/activities? Please <u>circle all</u> that apply.

a. A lack of time
b. A lack of information
c. Multiple responsibilities
d. Transportation
e. Course location is a problem
f. Course times are not suitable
g. Too expensive
h. Not enough funding
i. Learning difficulties
j. Lack of confidence
k. Child care issues
l. Elder care issues
m. Not enough support
n. Feeling intimidated or nervous
o. Mental health concerns
p. Find groups stressful
q. Physical health concerns/disability
r. Difficulties reading and writing
s. Inadequate language skills
t. Past negative school experiences
u. Don't have the courses I need
v. Negative attitudes toward adult learners

Other _____