

**SSHRC Strategic Networks in Education and Training
NALL Mid-Term Report: November 1, 1996 - March 31, 1999**

*Network Title: The Research Network for New Approaches in Lifelong
Learning Network (NALL)*

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PART I

Objectives

Since funding of the SSHRC Strategic Networks in Education and Training was received in December 1996, NALL has taken part in a wide array of research, networking and dissemination activities. Over the course of the past two-and-a-half years, NALL has steadily moved toward our collective goals by initiating, guiding and collaborating with members across our approximately forty research projects, encompassing over 20 community partners and almost 60 academics and collaborators.

1. Revised Statement of Objectives

From its inception, NALL's central goals have remained constant. We have intended to chronicle informal, extra-institutional learning and relate it to formal education and course-based, further education programs. Our secondary goal is to identify the main social barriers that prevent informal learning from closer integration with institutionally-organized programs. Finally, we aim to develop and support new program initiatives to overcome these barriers. To date, we have made solid progress toward these objectives.

NALL has committed simply more of its resources to the nurturing and development of partner-based projects than was originally anticipated. For example, we have encouraged community-partners to come forward with practical projects that extend our mandate into new conceptual areas or essential research domains. At times, we found the need to recruit new partner-organizations (e.g. United Food and Commercial Workers, Telecommunications Workers' Union, Canadian Teachers' Federation) in order to draw on local expertise and expand NALL's research in untapped areas. This suggests an enlarged role for the Networks in Education and Training, one that draws on the indigenous knowledge of community collaborators to augment gaps in the academy. As Lerner et al note:

"...universities must ... become agents in community engagement and empowerment. This change requires a revised view of scholarly functions in the university, one that creates "outreach universities," that is, institutions of higher education that generate, transmit, preserve and apply knowledge to societal problems as these problems are defined in concert with community collaborators.... To reach such collaborative definitions, a co-learning model that merges expertise in communities with expertise in universities must be developed."

—Creating Outreach Universities: Challenges and Choices. (1998) Lerner, Simon and Mitchell. Westport, Conn.: Praeger.

While our basic objectives remain essentially unchanged, NALL has wholeheartedly embraced community partnerships, paid careful attention to democratic processes and taken every opportunity to open collaboration among partners. Our researchers have experienced the trepidations of conducting nontraditional research that is both useful and sensitive to the needs and wishes of our partner-communities, but we find the rewards are ample in terms of generating valuable, new research data.

Among the practical implications of conducting joint work with community partners is that modes of dissemination may not follow the customary academic route. Our experience informs us that working with community partners calls for dissemination at community meetings, partner newsletters or other community-based vehicles. In other words, this particular mode of co-operative research partnership calls for collaborative engagement of an entirely different sort. We have discovered that what is required here is an alternative set of measures. For example, research project time allocations are likely to require longer periods for completion and peer-reviewed publications may be less likely.

2. Progress Made Toward Network and Program Objectives

In terms of NALL's chief overall objectives, we have gathered a significant database of literature, broad-based survey data and ethnographic material which documents the existence of informal learning and its relationship to further education and formal schooling. Our site-based projects (e.g. ACTEW, Quarter, OFL/BEST, Corson, KTEI, OSSTF, Shragge et al, etc.) have specified many of the social barriers which prevent the integration of extra-institutional informal learning with more formal programs and accreditation. Our next phase will see us identifying and supporting new program activities and initiatives that promise to surmount these social hurdles.

Several NALL projects have already completed their research projects, for example, the Quarter and OSSTF projects which were completed in Year 2, while Lowe-Bowlby and Bank of Montreal/IFL completed their work in Year 3 (see Appendix I). More detailed accounts of the progress of ongoing projects appears in the following section. Overall, we believe NALL has made very good progress.

B. Activities of the Past Year

1. Research Undertaken

As indicated in our past reports, NALL's research activities have been subdivided into six distinct groups as follows: Group One has conducted and completed the first National Survey of Informal Learning Practices; Group Two examines the best practices of Prior Learning Assessment and Recognition (PLAR); Group Three is engaged in documenting the informal learning cultures of major disadvantaged groups, such as visible minorities, women and workers; Group Four is researching the multiple and varied transitions between learning and work throughout the life course; Group Five is comparing informal learning in different types of paid and unpaid work environments and Group Six examines the computer-based informal learning of subordinate groups.

NALL's Year 3 (April 1, 1998-March 31, 1999) began with an assessment of submitted project proposals. The comprehensive process of reviewing detailed proposals, evaluating their proposed project budgets and awarding project funding was completed in mid-April, 1998, when 40 projects were approved for NALL funding. Of these, 34 were ongoing projects that began during the first complete year of NALL's operation. These projects have continued their field-based data-gathering in consultation with participants or their representative organizations, data assessment and report-writing. Year-end progress reports from our principal researchers indicate that nearly all approved projects have made significant progress.

Group One: National Survey of Informal Learning Practices: This Group's first major Year 3 accomplishment was the completion of an 80-page bibliography, entitled "Preliminary Bibliography of the Research Network for New Approaches to Lifelong Learning (NALL)." With the assistance of the project leader, a graduate student researcher was engaged to assemble, review and annotate the premiere existing research on informal learning and its linkages with organized education. This essential report was published in print and made available widely online. An update of this work is planned for the Summer of 1999.

Year 3 also saw the completion and preliminary dissemination of the First National Survey of Informal Learning Practices, which examines the extent of adult learning, the existence of social barriers to education courses, and more effective means of linking informal learning with organized education and work. Based on the lowest bid and the most extensive capabilities, York University's Institute for Social Research (ISR) won the contract for conducting the national survey. A restructuring of the interview schedule was

completed in April 1998 and ISR conducted a final pilot study of 200 respondents through the mid-1998 period, with the survey conducted on a national basis from August to November, 1998. This survey, based on a random phone survey of 1,562 Canadian adults has seen widespread dissemination among our members for discussion, analysis and comments before a nationwide public release on November 11th 1998 (see Appendix 'J' and Section II.4). We are now engaged in consultation with representatives of Statistics Canada, the OECD and the European Union with regard to replications of this benchmark survey.

Interest in the national survey has also led to a successful related project; a parallel survey of the informal learning practices of teachers, conducted with the unprecedented co-operation of all Canadian teachers' federations. "The Canadian Teacher Learning Survey," is a collaborative project which unites NALL community-partner OSSTF (the Ontario Secondary School Teachers' Federation), represented by Rosemary Clark and York University faculty member Harry Smaller in what is largely a replication and adaptation of the NALL national survey. This project has been conducted among teachers with the endorsement and financial assistance of 10 Provincial Teachers' Federations. This project involves the collaboration of the Canadian Teachers' Federation (CTF), as well as all ten provincial teachers' unions across the country. Marita Moll of the Canadian Teachers' Federation serves as project advisor. After field testing and extensive consultations with liaison members from each of the ten unions, approximately 1,900 English-language forms were mailed nationally, while 700 French-language forms were mailed out in Quebec and Ontario, to randomly sampled elementary and secondary school teachers. The Canadian Teachers' Federation has placed the 'NALL Teachers' Survey' on their recent agenda, and all Canadian provincial teachers' federations currently have a copy of the study's goals, data and conclusions on their individual websites.

The chief purpose of the next phase of this project is to develop a theoretical and applied framework for use by organizations, particularly teachers' unions and related groups, in developing in-service programs for teachers which enhanced their on-going, informal educational processes. In that regard, it is anticipated that, in addition to generating the normal academic papers, reports and/or book chapters, this project will culminate in reports and presentations of direct use to organizations involved in developing, or collaborating with, teacher education programs.

Group Two: PLAR (Prior Learning Assessment and Recognition): In establishing their research foci, Group Two members chose to follow an alternative organizational path and collectively decided to constitute four foundation projects in addition to their individual research. The four support projects, which feed research results to the entire group are: the Development of an Annotated Bibliography for PLAR, a Review of the Current State of the Use of PLAR in Canada and Abroad, the Development of a "Values" Document for PLAR, and an Exploration of the Current and Future Uses of PLAR.

As part of the 'values' project, co-authors Gail Carrozzino (MLEC) and Sandra Clifford (OFL) presented a working-draft of the collectively-written 'labour-values' document to the joint CASAE-NALL conference at the HSSFC conference in Ottawa in June 1998. Additionally, representatives from the university/college and business sectors have drafted 'values' documents reflecting the points of view of these stakeholder groups. NALL was also a co-sponsor and organizer of the PLAR Symposium held by George Brown College's School of Labour in April, 1999. There, NALL members presented the work of Group Two and played a key role during the day. A draft of the 'labour-values' document was accepted by the Canadian Labour Congress' Training and Technology committee in September 1998 and, with partner-approval, the document will be refined for presentation to the Ontario Federation of Labour's Training Committee in late May, 1999. The policy statement on PLAR arising from the 'labour-values' group has seen wide distribution at the union affiliate, provincial federation and national levels of the Canadian labour

movement, underlining our focus on the labour movement as a major dissemination vehicle.

The annotated PLAR bibliography was designed to provide assistance to agencies introducing PLAR for the first time, to individuals entrusted with implementing PLAR policies, and finally, to members of the public wishing to make use of the opportunities presented by PLAR. The Bibliography has been completed and posted on the CLFDB website www.plar.com/database/index.html. The bibliography has also been widely distributed to all participants and contributors, and will see broad dissemination over the course of 1999-2000.

Other Group Two highlights include the recently completed ACTEW project, which has seen the publication of a "*Skills and Knowledge Profile*" document and its accompanying video.

Group Three: Informal Learning Cultures: This Group saw a large degree of partner-progress in a variety of areas, including the Working-Class Learning Practices (WCLP) study, which brought together partner-representatives from each research site, in a joint focus-group meeting held at OISE/UT in October 1998. Observing the Participatory Action Research mode, summary site reports were distributed at two large union meetings, while an article on informal learning among Oshawa autoworkers is planned for distribution among Canadian Auto Workers Local 222 members during the Fall of 1999. There is also strong potential for the establishment of an undergraduate, community-based, labour-studies centre that draws on (and credits) the informal knowledge of labour-activists in the Region of Durham.

The Group Three projects by Wotherspoon and KTEI share common views in working within the field of aboriginal Canadians' informal and indigenous learning. Wotherspoon's Aboriginal researchers have completed their urban interviews and are nearing completion of their research in rural sites. The KTEI project has completed an initial research report on the informal learning and teaching traditions of native Elders. The report describes the context of the work of Elders and underlines the importance of Elder involvement in formal education.

An effective strategic meeting at NALL's February 1999 conference resulted in a group decision to do the following: 1. Formulate a one-page policy document regarding the implications of each of the Group Three projects; 2. further strategize what government ministries or agencies to address; 3. TYP project deemed the best site for a 'best practices' video-taped session for distribution via CD-ROM, community cable access channels or public television; 4. Plan a Group meeting in 1999-2000 at a partner site, possibly KTEI.

Group Four: Learning and Work Transitions: Group Four houses NALL's first complete project. Conducted in association with the Ontario Secondary School Teachers' Federation, the project and results are reported in "*Narrowing Opportunities for Adults in Ontario Secondary Schools: A study of students affected by the changes to provincial funding of adults and the Education Act 1996.*" This study asked adult learners enrolled at Ontario schools to complete a questionnaire detailing their formal learning experiences in Ontario schools and the links to lifelong learning and future education. The study is currently available to teachers' federations across Canada. NALL and the OSSTF are reviewing a video presentation of the key points of this study (see Appendix 'J') for joint decision-making regarding further dissemination possibilities and venues.

Under the rubric of 'transitions from school-to-work,' Tanner examined the long-term impact of delinquency on education and later adult occupation attainments. This study found that all types of delinquency have a consistently negative and significant impact on educational attainment for men and women. An article based on this study is forthcoming in May 1999's issue of the journal Social Problems. Links to informal learning are currently being explored.

The Study “*Informal Learning in the Transitional Year Programme (TYP) at UT*” saw preliminary work undertaken in NALL’s Year 3. TYP students and faculty are undergoing a survey of their informal learning experiences in a replication of NALL’s National Survey. Semi-structured, ethnographic oral-history interviews are also being conducted to identify social barriers erected as a result of the indigenous informal learning of this primarily black and aboriginal student and faculty body. Staff members of TYP have formed an advisory board to co-ordinate this joint research project. Researchers here will continue to work with staff and students to deepen the engagement of informal learning within the current TYP curriculum, by setting in motion an improved set of internal practices and policies.

Group Five: Informal Learning in Different Workplaces: Group Five members met in the Fall of 1998 in a successful all-day session which was a key follow-up extending from NALL’s Second Annual Conference in May, 1998. This community-partner inspired event saw academic researchers take a backseat to partners, who led sessions with a practical focus on grounded outcomes. Members agreed that the juxtaposition of all our work sites made the articulation of alternative definitions of informal learning a pressing necessity. Among the questions posed were: “how could you describe learning within your particular site?” and “what factors shape (enable or constrain) learning within the environment that you are studying?” An emerging consensus at this meeting concluded that informal learning is not separate from, but shaped through organizational culture. Organizational structures both enable and constrain informal initiatives for learning. Therefore, for example, the examination of informal learning within a trade union varies from an examination of informal learning within a psychiatric survivor-run business.

Group Five members found that NALL’s definitions of informal learning need redefinition for added flexibility in these ‘disadvantaged’ research venues. Members speculated that Group Five’s contribution to NALL may include an expanded definition of informal learning that highlights unintentional, or ‘legitimate peripheral’ learning. That is, learning as an unexpected outcome of a more structured activity and its embeddedness in relationships and social processes. The work of NALL’s Group Five “social learning” project (Church, Fontan, Ng, and Shragge) supports this general framework and has found that social learning among people excluded from the labour market calls for a broadened definition of informal learning. A working-paper is presently being written to support these concepts and the ‘social learning’ group plans to host the second annual Group Five workshop in October 1999, at the offices of 761 CDC, using this as a framework for discussion. Eventually, the final version of this paper will become a product of NALL.

Group Six: Computer-Based Informal Learning: It should be noted that according to NALL’s original schedule, most of the significant research and program development under this research domain will be conducted in Years Four and Five of the network’s activities. Additionally, in terms of its future function, Group Six’s role will become increasingly significant in dissemination of NALL’s research findings. Last year, Group Six expanded its membership to include the research director of the Canadian Teachers’ Federation, Marita Moll. This group’s lead project entitled “Testing New Learning Technologies for Labour Education and Training,” begins in Year Four (April 1999-March 2000). The purpose of this project is to test new learning technologies as part of the Canadian Labour Congress’ labour education and training activities. During the course of Year Two and Three, several preliminary reviews of the incidence and implications of computer-based informal learning were completed by Group leader Dr. Jeff Taylor (see Appendix ‘J’). Recognizing the growing importance of *computer-based informal learning*, as confirmed by the NALL National Survey, efforts have been made to attract a wider group of researchers, collaborators and projects to the Group Six theme.

2. Networking and Collaboration Among Network Members

In order to establish a true collaboration between Community Partners and Academics, NALL has consulted in an extensive fashion with a host of organizations outside traditional academic spheres. One of NALL's community partners, the Canadian Research (CRIA) had already conducted an investigation into community-academic research partnerships, and this document ("Research Partnerships: A Feminist Approach to Communities and Universities Working Together") was used as a template for establishing relations among our members. One exciting example of a partner-collaboration is the October 1998 Group Five meeting held at 761 CDC (Community Development Corporation), located on Queen Street West in Toronto's low-income Parkdale area. Lunch was catered by 761 CDC constituent "The Raging Spoon," a community-based psychiatric survivor restaurant. The cost of the meeting was wholly underwritten by 761 CDC and co-chaired by 761 representative Katherine Church and OISE/UT faculty member Nina Bascia.

NALL plans to approach WRNET and the York network to work jointly to assist members of CLERA (Canadian Labour Education Research Association) in establishing a database of labour researchers and educators. The potential database would be of use to trade union educators, researchers and activists who are interested in gathering data in their specific subject-area. This potential project would assist all three networks in disseminating research results to trade unions and their members. It should be noted that this project is still at a preliminary stage of discussion (which took place at the Canadian Labour Congress convention in May, 1999). Of course NALL remains open to further joint initiatives with diverse social groups, dependent on the potential project's compatibility with NALL's research criteria.

3. Training Opportunities

Student training opportunities within NALL have been extensive. To date we have trained 35 students (see Appendix 'F') working with about 60 faculty researchers in a total of 40 projects. NALL student trainees have participated in virtually every facet of academic research. For example, our student trainees have engaged in the refinement and focussing of the research question, construction of the survey instrument, data-gathering, field-research, networking with research participants within the participatory action research (PAR) framework, data-analysis, the development and eventual write-up of research results, meeting with experts and academics in their field, research report-writing, participation in conferences and dissemination of research results.

Not only have our student-trainees worked closely with their principal investigators, but students have collaborated closely with NALL's coordinator and director in order to fully understand the nature of informal learning and associated literature and research as well as the implications of a PAR mode of research, which asks for extensive contributions and feedback from research participants.

4. Dissemination Activities

Group One, which produced NALL's annotated bibliography, "A Preliminary Bibliography of the Research Network for New Approaches to Lifelong Learning (NALL)," has brought our work to the attention of many postsecondary institutions, including George Brown College (Toronto), which has purchased almost 40 printed editions of the NALL Preliminary Bibliography to date. Other institutions have purchased copies of our bibliography, with the majority of these primarily within the adult education field. Additionally, the NALL Bibliography has been used extensively to inform the project work of all NALL groups. This work has been posted on NALL's website since late 1998 with an easily-accessible online search capability that allows the user to easily locate a published piece. We have distributed hundreds of

copies of our Bibliography in a variety of media, including hard copy, website and computer diskettes. The NALL Bibliography has been adopted as a teaching tool at postsecondary institutions which are involved in training PLAR.

The Fall of 1998 saw the completion of the first National Survey of Informal Learning Practices. Initial survey results were released to the public in a national press campaign which was inaugurated on November 11th 1998. This saw a major press release which was distributed to dozens of national and regional news agencies. A summary of the survey's general findings is available on NALL's website and can be viewed at NALL's website which is located at: www.oise.utoronto.ca/depts/sese/csew/nall. Efforts are currently underway to mirror and link the NALL website at a variety of additional locales.

In addition to the press release of our general survey findings, which received wide national media coverage and created numerous new national and international network contacts for NALL, the key national press placement was an exclusive report of the NALL national survey which was reported by The Globe and Mail, Canada's major national English-language daily (see Appendix 'K'). This news item was subsequently picked up by the Canadian Press (CP) news agency and was further relayed to numerous English-Canadian daily newspapers. A variety of broad media interviews and press placements were also conducted with an assortment of outlets, including CBC Radio One, Ming-Pao, the largest Chinese-language daily newspaper in Canada and a variety of university campus newspapers, among others. The media campaign led to a further series of targeted dissemination activities which were specifically aimed at educational providers, academic institutions, private sector agencies and employers, regional interest groups and workplace agencies, including provincial training boards such as the Durham Region and North Bay Local Training and Adjustment Boards (LTABs), the Canadian Auto Workers (CAW) union, the Ontario Education Alliance, the Ontario Prior Learning Agency (OPLAN) and the National Issues Forum, among others. Additionally, survey results have been presented to audiences of academics and policy-makers both in Canada and internationally (see Appendix 'J').

General summaries of our National Survey findings were distributed to hundreds of academics, educational institutions, private organizations and government agencies at all three levels. Copies of our survey press release and general summary findings were also posted on the NALL website, along with a press release and our interactive listserv "nall-net" <nall-net@oise.utoronto.ca>. This generated dozens of inquiries from around the nation, and indeed, around the world, with queries from regions as distant as California, Germany the U.K. and Australia. The University of Toronto Press Office distributed many NALL press releases to their extensive list of national media contacts. NALL in turn received many inquiries forwarded from the University of Toronto Press Office.

We intend to continue our dissemination activities of the national survey results by publishing a book on all the general and follow-up findings, and to widely disseminate the most important results for policy debate and program development. We also plan to prepare a videotape of thematic interviews on specific informal learning themes (e.g. health-related learning practices, computer-based informal learning) for general dissemination to sensitize general audiences to the significance and possible practical benefits of recognizing informal learning. We will explore possible broadband dissemination of the survey findings with public television and local cable-access community providers, as per our original proposal. Moreover, the costs of CD-ROM production has dropped drastically since our initial proposal. We hope to transfer our videotaped interviews and provide an interactive CD-ROM, which will include a summary of the survey findings with illustrative interviews, interviews with researchers, an annotated bibliography of informal learning sources, the national survey interview schedule, an interactive opportunity to participate in the interview and links to the NALL, and related, websites.

In the Spring of 1998, NALL members Ng, Tanner, Livingstone, Verma, Heinz and Lowe participated in an International Symposium entitled “*Restructuring Work and the Life Course*,” co-sponsored by University of Toronto’s *Institute for Human Development, Life Course and Aging*. In May, 1998, NALL held its Third Annual Conference at Carleton University in Ottawa. The conference theme, “Wrestling with the Iceberg of Informal Learning,” spurred NALL members to discuss the future implications of uncovering widespread societal informal learning activities. At this conference NALL partners took the lead and piloted a half-day session with the theme outlining the challenges of “working with academics.” One outcome of this session was the drafting and later ratification of a ‘Partner-Academic Co-Determination Model’ which has served as a guidepost for relations among NALL’s community-partners.

The NALL website has become a key to our dissemination activities. The NALL National Survey questionnaire was made available on our website in an interactive format, allowing computer users around the globe to self-administer the survey, mail in the results and learn more about the nature and extent of their own informal learning. This portion of our website has been well received with many ‘hits’ from around the country. Many participants have also taken advantage of the interactive opportunity afforded by this site to automatically email the results and comments of their website survey to NALL, further adding to our database of information. The private sector remains an important ally in our dissemination and outreach strategy and NALL continues to engage in information-sharing with the private-corporate sector on a regular basis.

A recent development is the recognition that over one-third of NALL projects have significant labour participation. At the suggestion of our Steering Committee, NALL plans to hold a NALL labour caucus meeting, in order that labour members within the network have an opportunity to discuss shared issues and themes. We hope this will also prove to be a significant dissemination vehicle and may use the Canadian Association for Labour Media (via CALM contact Rosemary Barr) as a primary venue for the distribution for this information.

5. Annual Workshop

NALL held its 3rd annual conference at OISE/UT on February 19-20th 1999. The conference, entitled “Wrestling with the Iceberg of Informal Learning” was organized around the theme “What are the central challenges to understanding and using informal learning in Canada today?” The conference featured plenary session reports by network director David Livingstone and Group Two co-leader Alan Thomas, along with research reports from six project researchers (see Appendix ‘J’). Keynote speaker Allen Tough, who initiated an international research tradition in informal learning, presented an overview of his life’s work in a lecture entitled “Reflections on the Study of Adult Learning.” All NALL groups met and discussed individual projects and common problems, with particular attention to project output and dissemination strategies.

At a June 1998 meeting in Ottawa, the five network leaders discussed the annual all-network workshop and conference, as suggested by the SRNET guidelines. The network leaders agreed that none of the five networks was currently in the position to participate or undertake an SRNET conference, given that our current energies are being devoted to individual network research and dissemination. This joint discussion was reanimated with a proposal for a joint 5-network conference during 1999 or 2000. In February of 1999, the five SRNET leaders held a conference call and finalized an agreement to host a joint conference in the Fall of 2000. The network leaders concurred that the University of Toronto campus’ central location and facilities would provide the greatest opportunity for broad participation and a national media audience. NALL administrators would plan the key venues and accommodation for the conference, which is to provide full translation in both official languages and is scheduled to take place over a 2-3 day period.

Network leaders further agreed that an open call for papers would take place among all five networks, with paper presentations, poster sessions and joint plenaries taking up the bulk of the proposed conference.

The network leaders agreed that the allocated budgets for individual network conferences could not cover the proposed, much more extensive 5-network Year 2000 conference. We respectfully submit to the SSHRC an additional budget request for \$50,000 in order to cover conference costs such as publicity, promotional brochures, programmes, registration, conference administration, rental of facilities, travel, meals, accommodations, student, professional and contract salaries, workshops, meetings and materials.

6. Internal Communications

NALL's primary research methodology has proven to be our model for internal communications as well. Using a Participatory Action Research model, we have emphasized information sharing among our members. Our primary mode of face-to-face communications have been meetings at conferences, plenary sessions and group meetings. Directives from these venues have been relayed, generally via project leaders to the network director or coordinator and to the NALL Steering Committee. The Steering Committee, which meets on a quarterly basis, then discusses and implements policy to be conveyed via the network director or administrator to NALL's group leaders. The group leaders and coordinator in turn communicate this information and/or policy directives to individual NALL project leaders.

However, NALL has managed to avoid overly-bureaucratic tendencies by maintaining open lines of communication through regular contact with project leaders via email, NALL's internal listserv <ed-train@oise.utoronto.ca>, direct email, fax, telephone and personal communications. NALL's central administration has also encouraged its members to meet between conferences, within the Six-Group structure. Groups Two and Five, NALL's largest groups, have each had in-group meetings. Group Five held an all-day meeting in October 1998, at the offices of a NALL community-partner, 761 CDC (Community Development Corporation). There, NALL members discussed some of the common research problems and commonalities within Group Five's research focus and included an extensive group examination of the meaning and implications of research in informal learning. The NALL co-determination partnership model (Appendix 'L') was also discussed in great detail. This all-day group meeting came on the heels of NALL's Second Annual Conference (May-June 1998) and built on the partner-led conference sessions which examined the role that community-partners played within NALL's grounded joint research model.

Over the course of NALL's Year Three, four Steering Committee meetings were held. During this time NALL's Steering Committee collectively developed and refined the research criteria for evaluating NALL projects (see research criteria Appendix 'M'). In consultation with NALL members at our Third Annual Conference in February 1998, the proposal and reporting criteria were sharpened to emphasize tangible, grounded research products.

7. Significant Problems

NALL's first hurdle was to maintain our commitment to funding of partner-initiated projects in light of the SSHRC SRNETs funding criteria. These criteria outlined a research programme which included substantial collaboration and participation between academics and community-partners with no underlying funding. The funding model as prescribed by the SSHRC precluded any direct grants to community-partners, an arrangement which NALL found detrimental to authentic collaborative research. The solution, implemented with the consent of the SSHRC, was to broker partner-academic research 'teams' which saw academics assuming primary responsibility for initial funding, an arrangement which has worked

satisfactorily to date. At our 1998 annual conference, NALL made partner-academic research' the focus, leading the conference with a half-day session led by community-partners. This led to the drafting of a mutually acceptable model for conducting joint research and funding with the implementation of our partner-academic co-determination model (Appendix 'M')

NALL member Donald Wells recently informed us that other pressing commitments would have created a significant delay to his project and seriously hamper efforts to complete the research programme by October 2001. We are currently pursuing a replacement project with Vancouver-based trade unionist Sid Shniad, of the TWU and Richard Rosenberg, of UBC's Computer Science department (see Group Six). At this time, it is expected that the Shneid-Rosenberg project will replace the Wells project.

Bascia's Group Six project "Teachers' On-Line Professional Development" has been similarly canceled due to restrictions at the field site and concerns about the ability to fulfill its goals. Additionally, a planned project by the Ontario Coalition of Senior Citizen's Organizations (OCSCO) has been discontinued due to OCSCO's inability to devote significant resources to the development of the research agenda. A benefit from NALL's initial work with OCSCO was assembling a database of alternate seniors' organizations. NALL is presently attempting to locate an interested, suitable seniors' group for collaborative research project.

8. Statement of Total Expenditures

Due in part to both the initial delay in receiving our funding and the demands of establishing the network's infrastructure, NALL's active research program began later than originally anticipated, in April 1997 (see Appendix 'A'). This has meant that many of the originally funded projects have not spent their full funding allotment to the end of Year Three. Several projects have carried over substantial portions of their NALL grant, leaving us with a temporary surplus in funds. However, it should be stressed that these funds have been committed to active NALL projects and do not embody residual funds.

Because of unforeseen circumstances, four projects (OCSCO, Bascia [Group Six], Borel, Wells) have been unable to begin their projects and have returned their grants to NALL's general funds. In most cases, projects were found to close these research vacancies but associated delays meant that some of these funds have also been carried over to Year Four. We have reserved some additional resources for contingencies and the funding of future initiatives. For a complete overview of NALL's Year Three expenditures, see Appendix 'O'.

As specified in Appendix 'N', both the University of Toronto and OISE/UT have now committed to provide direct financial support for NALL. As of March 31, 1999, we have received \$29,000 in university funding, with a commitment for approximately \$80,000 in direct funds. From the outset, the university has provided substantial in-kind funding (see Appendix 'C').

C. THE FUTURE

9. Schedule of Activities for the Coming Year

Of our 43 approved projects, 29 will continue their case study work into Year Four. During the recent Year 4 (April 1, 1999-March 31, 2000) funding assessments, NALL has continued to extend its network by incorporating several important new projects. Innovative research programmes led by Haig-Brown, Mojab, Sawchuk, Carrozzino (UFCW) and Shniad (TWU) will extend our research program to new venues,

particularly with regard to Group Six. For example, the recently approved Group Six project entitled “The Impact of Enterprise Resource Planning System Technological Change on Formal and Informal Workforce Education,” is sponsored jointly by the Telecommunications Workers Union (TWU) and Richard S. Rosenberg of the Computer Science Department at University of British Columbia. NALL Steering Committee members are also currently considering a project proposal from the National Training coordinator of the United Food and Commercial Workers, Victor Carrozzino. In junction with academic liaison, Dr. Jeffery Taylor, this proposal tentatively titled “Computing By Pattern Transference” will first undertake a literature review in the area of training and new technology, then develop curriculum and pilot it at the training and education centre of the largest private-sector union local in Canada, UFCW Local 175. These projects will generate highly relevant information regarding computer-based learning and may be used to improve future education and training programs. Another proposed project, recently brought to us by Canadian Auto Workers (CAW) National Education Staff member Laurell Ritchie, brings NALL the potential to track informal learning in the electronics sector. This study in particular has the possibility to encourage joint labour-management discussions around training issues. Overall, these research ventures will significantly increase our research spectrum on informal learning activities.

Both wider dissemination and further analysis of our National Survey data are anticipated in Year 4. National Survey project leader Livingstone proposes a follow-up interview with a number of the national survey respondents, over 700 of whom have made available their names and expressed a willingness to be re-interviewed. These volunteers provide a unique opportunity to conduct further, more intensive qualitative exploration of learning practices on some of the most important and previously unexplored aspects of informal learning. The follow-up interview will pay special attention to those Canadians who indicated in the first national survey that they are doing very little or no informal learning.

NALL members interested in specific aspect of the data will have opportunities to contribute to this follow-up analysis as well as to the writeup of further publications related to both the 1998 general survey and the upcoming follow-up interviews.

During the latter stage of its life as a network, NALL plans to focus on intensive case study work and the development and support of new program initiatives which promise to overcome social barriers to the recognition of informal learning. We have already begun this task with contributions to the recognition of informal learning through the advancement of Prior Learning Assessment and Recognition (PLAR) credits at the secondary and post-secondary level by such means as the Annotated Bibliography on PLAR, the Skills and Knowledge Profile and the series of PLAR “values statements.”

To date, NALL Groups One and Two have seen the most concentrated activity and research results. Our initial plan was to build the research of Groups One and Two in the early phase of NALL, then to disseminate these data and use them within Groups Three, Four, Five and Six. Years Four to Six are intended to see field researchers make the maximum use of the data collected and analysed during NALL's first phase. As was noted in our original plan, the emphasis in Years Four through Six will be on detailed case-studies in these Groups' thematic foci. Members in Group Three plan to focus on state policy and indigenous informal learning, while Group Five members examine and redefine informal learning at their respective sites. Group Four members will deepen their exploration in lifecourse transitions, while Group Six extends its research program with the adoption of two new projects and the launch of its focal project (Taylor).

PART II

1. Contribution to Best Practices

NALL's major contribution to date to understanding and development of best practices in education and training has been the completion and initial dissemination of the first countrywide survey of informal learning practices. We have confirmed the extensiveness of the informal learning activities of Canadian adults, including those with low literacy in the dominant languages. We have established current benchmarks of the general incidence of informal learning activities for all Canadian adults and for the labour force, as well as general profiles of the relations of informal learning with other educational activities, social background characteristics and barriers to utilizing informally acquired knowledge in educational institutions and paid workplaces. This information should serve to further sensitize policy makers, program designers and curriculum developers to the knowledge bases and learning interests of their existing and potential clients, and as a valuable guide for continuing evaluation at national and more local levels of the responsiveness of education and training programs.

Second, NALL's contributions to the state of the art of prior learning assessment and recognition (PLAR) through our extensive annotated bibliography and our overviews of the application of PLAR by major interest groups offer valuable tools to guide the immanent development of PLAR as the central mechanism for improving the accessibility of adult learners to educational institutions in this country.

The participatory action case study approaches favoured by most Group 3-6 projects inherently require more time to ensure suitable research design than do the survey methods used by Group 1 and 2 projects to generate these general profiles of informal learning and PLAR practices. But more detailed and sensitive insights about best practices for and key barriers to linking informal learning with existing training programs are beginning to emerge from many of these case studies. In particular, the processes developed in some of our case studies for compiling "Skills and Knowledge Profiles" in local workplaces provide a prototype tool for use in future joint education and training program assessment and development by workers, employers and governments.

More specific contributions to best practices in each of these respects are itemized in Appendix 'J'.

2. Quality of Networking and Collaboration

From its inception, NALL was designed to operate with extensive collaboration between academics and community partners. At the most general level, our Steering Committee has balanced representation of community partners and academics to try to ensure fully collaborative decision-making on all important matters. Drawing on the prior experience of various members, and most specifically the SSHRC-commissioned report on research partnerships by our partner member CRIAW, NALL developed a co-determination model (see Appendix L). This model was subsequently approved by the SSHRC and has served as the basic guideline for both our general activities and specific project work. This model has enabled partner-initiated group meetings, annual conference sessions and several projects. New projects are required to have an academic-partner leadership team, which guarantees substantial collaboration in NALL's primary work. We believe that NALL may have established some exemplary precedents in this regard, for example in the collaboration of the academic leaders with all major teachers' federations across Canada through all phases of the Canadian Teachers' Learning Survey.

Ensuring effective networking among the many different projects in each of our project groups has been a challenge. NALL was intentionally designed to provide relatively small amounts of funding to relatively large numbers of projects. The initial mandate of each project was to focus on intensive case study research and try, if relevant, to generate additional funding to ensure success of the specific project. Inter-project collaboration was regarded as an issue to be addressed in later years of the network. Central administrative staff and Group leaders did try from the outset to establish effective communication links (such as

electronic mail networks and listserves) between different projects for dialogues and exchange of findings. At the annual conferences, Group workshop sessions have generally provided some further opportunities for consultations between related projects. At the 1998 conference, strong interest was expressed in provision of further forums for inter-project consultation. The largest Groups, (2, 3 and 5), have subsequently all had more extensive consultation sessions. Collaborative initiatives to design new collective projects under the respective Group mandate have occurred in each instance. Strategic distribution of cumulative case study findings via central staff should facilitate further collaborative work across previously established projects.

In terms of inter-network collaboration, general relations among all five funded networks remain quite positive. Consultations among the five network leaders have resulted in good progress toward an annual joint newsletter and a national conference in 2000 which NALL will host at the University of Toronto. Since our dissemination phase began in earnest with the public release of the general national survey findings, numerous additional networking and collaboration opportunities have arisen. The Steering Committee is reviewing these options carefully to ensure relevant choices are made to strengthen the network.

3. Management System Overview

The NALL Steering Committee has guided the activities of the network since SSHRC funding was received. While there have been a few individual changes, the general composition of this governing body continues to be balanced between academics and community partners. As previously noted, the committee operates according to a co-determination model. It meets quarterly to review projects and deal with other policy matters.

The Steering Committee determines which projects will be funded and for how much on the basis of submitted proposals, and then reviews the progress of all projects every six months based on mid-year and annual project reports. These reports are prepared according to criteria and formats approved at our first annual conference in February, 1997 and subsequently refined at our February, 1999 conference (see Appendix M). Steering Committee subcommittees are occasionally formed for specific adjudication tasks and conference planning, but all members are consulted on any major program or financial issue.

The Network leader and research coordinator conduct the day- to-day operations of NALL with the approval of the Steering Committee and may bring recommendations regarding approval and funding of any projects in which they are not directly involved as investigators. The part-time central secretary works closely with the coordinator on all issues pertaining to communications within the network.

The recently hired part-time financial officer works under the supervision of the research coordinator and liaises with other university financial staff as required for reporting purposes. The multi-project complexity of NALL has necessitated this additional post to bring our financial records up to date on all projects. As of Year 4, each individual project's budget will be the direct responsibility of its leaders. The financial officer will continue to keep detailed current expenditure records and advise the Steering Committee on the exact monies available during the second half of our mandate.

4. Problems and Resolutions

Our major problems have been: lack of guidelines for community partner relations; the challenge of coordinating a very large number of individual projects; and insufficient financial support to fulfill original project design.

Initial consultations between NALL academic and community partner members raised a variety of questions about project control and personnel. The resolution to these problems was the development of a co-determination model (see Appendix M). From all internal reports to date, this model is working very well.

The challenge of coordinating a large number of projects has necessitated allowing most projects to work largely on their own until they have generated some substantive results and then making every effort centrally to disseminate these results to all other potentially related members of the network. Special efforts to develop Group-centred communication networks, Group-specific workshop sessions at each annual conference and further follow-up meetings have also been helpful at increasing collaborative initiatives between projects. The recent hiring of a part-time financial officer has quickly improved budgetary coordination.

The initial SSHRC reduction of \$125,000 from our original budget and significant delays in obtaining further monetary support from the University of Toronto had immediate negative impacts on NALL, because the original commitment to both the conduct of the general national survey and funding a large number of specific smaller scale projects meant that the reduction was felt mainly at the level of reduced administrative capacity and very limited discretionary resources to engage in communications and wider dissemination work. As noted in Part I, we have now received monetary support from both the Dean of Education at OISE/UT and the Vice-President of the University of Toronto to address these needs during the remainder of the five-year SSHRC mandate. This monetary support was delayed largely because NALL support was connected to the university review process for a related research centre, the Centre for the Study of Education and Work (CSEW), a process substantially delayed by the merger of OISE and the University of Toronto. CSEW has recently been approved by the review committee and should now receive some additional administrative funding for the next three years. While this university support should resolve our internal problems related to reduced administrative capacity, we believe that the recent general increase in SSHRC funding make it reasonable for the SSHRC to review its prior funding recommendation for each of the five networks and restore funding to the originally designated level for Years Five and Six, to enable all networks to engage fully in both external dissemination and inter-network collaborative activities such as conferences. Whether or not full SSHRC funding is restored, the confirmation of university funding of NALL should ensure that we can successfully meet all of our internal objectives.