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Conference Program & Presentation Schedule

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THE UNIVERSITY
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VISIT

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HOSTED BY:



THE UNIVERSITY OF BRITISH COLUMBIA

Department of Educational Studies
Faculty of Education

Saturday, June 5, 2021

→ All times listed are Pacific Daylight Time (PDT) ←

07:00 Plenary Session

“We Are ALE” Campaign

International Council for Adult Education

Robbie Guevara, Shermaine Barrett, Timothy Ireland & Ricarda Motschilnig

**Toward CONFINTEA VII: A Pivotal Moment for the
Future of Adult Learning and Education**

Daniel Baril, Chair, UNESCO Institute for Lifelong Learning Governing Board

08:30 Break

08:45 Concurrent Sessions 6

08:45-10:15 Symposia 6.1

➤ ***Governance in complex and dynamic global contexts: Importance and characteristics that facilitate transformation through adult education***

Petra Buergelt, Aliko Nicolaides, John Buck, Marguerite Welch, Alexis Kokkos, Renee Owen, George Koulaouzides, Claudio Melacarne & Mina Wilson

➤ ***Critical research on adult education: Reflecting on politics, temporalities and the limits of how we understand and experience criticality***

Fergal Finnegan, Barbara Merrill, Bernd K apflinger & Michel Alhadef-Jones

08:45-10:15 Documentary Film Festival

Film showing and discussion

➔ ***“Zero Percent”***

Carole Roy & Shauna Butterwick

GOVERNANCE IN COMPLEX AND DYNAMIC GLOBAL CONTEXTS: IMPORTANCE AND CHARACTERISTICS THAT FACILITATE TRANSFORMATION THROUGH ADULT EDUCATION

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Abstract

Humanity is experiencing an existential crisis and people worldwide are looking for pathways to address this crisis. Transformative learning offers learning processes that facilitate the required individual transformations, but we lack knowledge regarding how to transform social institutions such as adult education organisations. We put forward that sociocracy offers a powerful governance framework capable of creating conditions for the individual and collective transformations to occur in adult education organisations that enable educators, researchers and students to address their individual and our collective existential crises and to thrive in times of complexity and continuous change.

Keywords: Transformation, transformative learning, governance, sociocracy, adult education organisations

The Need for Transformation at All Scales to Address Our Existential Crisis

Humanity is at a critical turning point. Physical and mental disease, abuse and violence, 'natural' disasters and pandemics, climate change, environmental destruction and species extinction increasingly bring home to people across the world that we are experiencing an existential crisis. Across the world, people individually and collectively experience diverse, compounding and interconnected personal, spiritual, cultural, societal and environmental crises and are looking for pathways to address their crises. Where we once were able to construct relatively stable selves, the crises create disorienting dilemmas that create a space for us to engage in a "continual search for meaning, a need to make sense of the changes and the empty spaces we perceive both within ourselves and our world" (Dirkx, 1997, p. 78; Dirkx et al., 2006). Parallel, societies around the world are becoming increasingly complex, diverse and dynamic (Berkes et al., 2003).

There is mounting evidence that the Western worldview is the source of this crisis, indicating that turning the tide requires a paradigm shift at all scales (Buergelt et al., 2017; Buergelt et al., in press; Grande, 2000; O'Sullivan, 2002). Surviving and thriving requires transforming people's fundamental cosmological, ontological and epistemological perspectives towards a worldview that will foster healing and multiple ways of knowing. It is

therefore more important than ever that we as individuals, groups, organizations, and societies develop the capacity to engage in transformative learning in order for us to navigate this environment of increasing volatility, uncertainty, complexity, and ambiguity (Bennett & Lemoine, 2014; Dirkx, 1997; Nicolaides, 2015). Whilst transformative learning theory and practice offer learning processes for individual transformation, there is a knowledge gap regarding how to accomplish collective transformations.

Are Adult Education Organisations in a Position to Facilitate the Required Transformations? The Critical Role of Governance

Adult education organisations in the broadest sense are increasingly being required to assist people individually and collectively to develop the capacities required to be able to use these crises as opportunities for transformative development and growth (Hoggan et al., 2017; Jarvis, 2011; Nicolaides, 2015). However, to fulfil this critical task adult education organisations themselves need to transform. Educational organizations do not operate in an ideological vacuum. The prevailing largely invisible political ideologies impose their philosophical frameworks on every educational institution in the same manner they infiltrate every other social institution and activity (Laursen, 2006). Ideology determines a series of vital intertwined aspects. Most critically, ideological convictions determine whether education is a social good aiming at emancipating people and creating citizens that have the common overall social good at their heart and collaborate or a commercial service that has the goal of producing obedient, individual workers that contribute to economic growth and are willing consumers (Simmie Mooney & Edling, 2016). This central ideological conviction influences whether educational institutions are state-funded or privatized and what knowledges they impart and how (Buergelt et al., in press). Importantly, ideology affects how educational institutions are governed (Mitchell, 1980).

Starting with Plato, the Western fundamental beliefs about cosmology, ontology and epistemology have shifted from the ancient matriarchal, metaphysical, nature-based, unified and egalitarian worldview to a patriarchal, totalitarian, mechanistic, positivistic, rational, reductionistic and individualistic worldview (Buergelt et al., in press). This worldview has gradually led to our era being characterised by the dominance of neoliberalism. The consequences of neoliberalism in education have been discussed thoroughly by many prominent scholars (e.g., Jarvis, 2007; Levin & Greenwood, 2011; Torres, 2008). In adult education, neoliberalism has, according to Giroux (2004), resulted in a dominant public pedagogy that exploits all the available educational means of our culture to deny and demote the conditions that facilitate the development of people to undermine their critical agency and have them being obedient and compliant workers and consumers (Buergelt et al., in press). To maintain the status quo and sustain itself, neoliberalism designed a governance system that leads to decisions being made in ways that indisputably supports decisions that are in the interest of the social elites and impede people understanding, challenging and acting (Bruff, & Tansel, 2019; Buergelt et al., in press).

As a result, over the last decades, neoliberalism has led to educational institutions increasingly being governed by administrators who use authoritarian top-down hierarchical governance systems to ensure that educational institutions are serving the economy and marketize education. This authoritarian top-down governance system has been resulting in "authoritarianism, suppression of information, maladaptive behavior, lower quality and transparency, and the creation of scores of new administrative positions to run an unwieldy, ineffective system" (Levin & Greenwood, 2011, p. 37; Lingard & Lewis, 2016), preventing education in fulfilling its social mandate of transforming individuals and societies in ways that ensure the health and well-being of citizens and nature (Martin, 2016). It has also resulted in educational institutions contributing to the existential crisis we are facing by perpetuating Western ways of knowing, cultures, and pedagogies. We put forward that sociocracy offers a powerful governance framework (Buck & Villines, 2017) capable of

creating conditions for collective transformation of organisations such as universities, which may enable educators, researchers and students to thrive in times of complexity and continuous change.

Is Sociocracy A Governance That Facilitates the Required Transformations?

Sociocracy represents a paradigmatic shift from linear, hierarchical, democratic governance structures that reflect prevailing Western worldviews to a participatory, whole-systems governance that is rooted in ancient, Indigenous and critical Western cosmologies, ontologies and epistemologies that are based on ecological laws and principles. Sociocracy, which means literally "rule by the socios", is governance by people in association with one other. It is an inherently participatory process where, instead of rule by majority or other power determinants, relationships are at the core of the decision-making process (Buck & Villines, 2017). Using the tenets of self-organizing theory, it is a governance and decision-making system that allows an organization to govern itself as an organic whole (Owen & Buck, 2000).

The basic elements of sociocracy can be thought of in terms of structure and process. The sociocratic structure consists of circles with permeable boundaries that are connected via double links that ensure dualistic down and up feedback loops, enabling every sub-part of the organization to have an authoritative voice in the governance of the whole organization (Buck & Villines, 2017). This unique structure is paired with an innovative full-group consent decision making process (distinct from consensus), which provides a natural means of individual and group reflexivity. These defining elements of sociocracy whilst quite simple and once understood easy to follow have profound impacts. Any organization can implement these key elements while also maintaining its existing organizational structure for efficiency. Once in place, the sociocratic elements provide a flexible means for an organization to be thoughtful about self-designing and further developing its structure and procedures to best accomplish the goals and values of the organization. This ongoing dynamic process led to sociocracy being given the moniker "dynamic governance" (Buck & Villines, 2017).

While the elements of sociocracy are simple, they simultaneously require and create a paradigmatic shift in governance that embraces complexity, leading to extraordinary potential for transformation in individual and group consciousness. Sociocracy distributes power to enable groups to govern themselves collaboratively as partners sharing knowledge, solving problems, and seeking consent in ways that creates new mutually benefiting futures. In sociocratic educational systems, educators, researchers and students have the power to influence the organisations in which they are participating. Sociocracy naturally promotes tremendous creativity and innovation through its collaborative processes for drawing out, harnessing and synergising complex, diverse and changing knowledges and perspectives. This dynamic process enables systems, such as educational institutions, to learn from and adapt to complexity and change in agile ways. Ultimately, sociocracy offers ways for developing people's full potential and utilizing the energy of all members to accomplish the aims of the whole collective. By ensuring that all voices at all levels are respected, heard and considered, an organization safeguards inclusiveness of multiple viewpoints, equality and the ethics of actionable decision making, resulting in higher quality decisions based on collective intelligence (Owen & Buck, 2000). In sum, sociocracy facilitates both collective and individual transformations in an intentional, conscious, gradual and nurturing yet revolutionary way.

What Are the Linkages Between Transformative Learning and Sociocracy?

The stated ideas of collaboratively seeking consent, mutuality, and cooperative action have strong affinities with the theoretical traditions of transformative learning. Habermas

(1984) introduced the notion of *discourse*, understood as a specific form of reflective dialogue in which we enter with the commitment to question, together with our interlocutors, the validity claims of our speech acts, seek mutual understanding and come to agreement and common action. Mezirow (1991) adopted the Habermasian view and transferred it to reside within his theory. He stressed that discourse might not be conceived in terms of antagonism between opposing sides. He pointed out that "Discourse is not based on winning arguments; it centrally involves finding agreement, welcoming difference, 'trying' on other points of view, identifying the common in the contradictory, tolerating the anxiety implicit in paradox, searching for synthesis and reframing" (Mezirow, 2000, pp. 12-13). Within this framework, the argument the interlocutors will agree upon constitutes the result of a participative process of collective judgement (Kokkos, 2020).

Moreover, Fleming (2018) drawing from Honneth's (1995) theory of recognition, which is a notion understood as an interpersonal process of caring and supporting that builds reciprocal self-respect, self-esteem, and self-confidence, claims that discursive action within the transformative learning framework should be grounded in this concept. Belenky and Stanton (2000) put forward the idea that the essence of a learning group's interaction should be the concept of *connected knowing*, within which participants look for strengths, not for weaknesses, in each other's argument, seek to understand each other and engage in collaborative practice. Taylor (2009) stresses the importance of authentic relationships, that is the establishment of a meaningful learning environment that may "allow individuals to have questioning discussions, share information openly, and achieve greater mutual and consensual understanding" (p. 13).

Both sociocracy and transformative learning share people actively and equally participating in the decision-making process and considering innovation and learning at the personal, group and organizational level as a process of emancipation. They also have in common that power needs to be distributed and the directions of learning needs to be defined and co-created by people. However, sociocracy adds to transformative learning. From the perspective of Mezirow (1999) to the latest transformative learning debate (Taylor & Cranton, 2012) *individual* 'reflection' is seen as the key aspect for transformation to occur. Sociocracy expands this idea by offering a governance structure and process that creates conditions that facilitates *individual* and *collective* transformation simultaneously.

Why and How Do We Use Sociocracy?

We are all members of the International Transformative Learning Association (ITLA) Leadership Circle. We created this circle to transition the ITLA from a loose network to an association that creates an inclusive, respectful, safe and nurturing space for educators-researchers-practitioners from diverse disciplinary, cultural and social backgrounds to interact in ways that creates and facilitates transformations of each member but also contributes to cultural and social transformations and thus the transformation of humanity. We want the ITLA to facilitate members to express their uniqueness, to function fully autonomous yet be interdependently connected, to easily connect and interact with other members, to fulfil their own interests and needs as well as the interests and needs of the whole ITLA community and beyond, and to adapt to changes in their contexts.

To accomplish these aims, we needed a governance capable of creating the space for individual and social transformation and enabling autonomous self-organising and agile adapting of all members in ways that ensure the balance/harmony of the entire ITLA and harnesses the diverse intelligence of each member for the benefit of the whole. When John Buck presented the keynote on sociocracy as transformative governance at our International Transformative Learning Conference in 2019, we realised that sociocracy was the governance we were looking for. For over one year, we have been courageously learning sociocracy by applying sociocracy to develop the ITLA structure and processes. The value of sociocracy emerged very fast as it turned the great diversity within our leadership circle

from a potential stumbling block into a great asset that enabled us to create innovative structures and processes for the ITLA. It is the same diversity that will lead to a reach exploration of the governance systems we experienced and whether and if yes how sociocracy offers a powerful governance framework capable of creating conditions for individual and collective transformation of higher education organisations.

How Does Sociocracy Look Like In Action?

With this symposium we intend to accomplish three intertwined aims: providing an opportunity for experiencing sociocracy in praxis, exploring the potential of sociocracy to transform higher education and discovering the commonalities between sociocracy and transformative learning. After offering an overview of the challenges higher education is facing and introducing sociocracy, we will enact diverse key sociocracy processes and principles, especially rounds and consensus decision-making using a fishbowl as a pedagogical practice to facilitate embodied learning. We will be aiming at reaching a common decision/conclusion which we all consent on and harnesses our diverse perspectives. After the enactment, we will be sharing how we use sociocracy, including successes and challenges, by drawing upon our highly diverse distinct personal, disciplinary, cultural, and social backgrounds and experiences of varied governance systems in higher education, organizations, countries and social systems as scholars, practitioners and social activists.

John Buck, President of GovernanceAlive, LLC, certified by the International Sociocracy Certification Board, author, will describe how "rewiring" basic power structures can improve organizations' collaboration, effectiveness, and engagement. He will lead short exercises that illustrate life in a rewired organization, including: blindspots, both-and thinking, rapid prototyping, and image living in an octopus.

Petra Buergelt is an interdisciplinary social scientist who has experienced diverse education systems and worked with private businesses, associations, government and universities in East Germany, West Germany, New Zealand and Australia. Petra grew up in a collectivistic socialist country with a governance highly similar to sociocracy. After the 'reunification' of East and West Germany, she experienced the individualistic capitalist social system which creates competition, suppresses voices, and exploits and harms people. Since 2014, she has been working with diverse remote and very remote Indigenous communities in Australia and Taiwan, whose governance structures and processes are akin to sociocracy. Petra will be comparing Indigenous and East German governance with sociocracy and share how she is using sociocracy to decolonise and indigenise the curriculum, highlighting the transformations sociocracy makes possible for faculty and students.

Aliki Nicolaidis, an Associate Professor of adult learning and leadership at the University of Georgia, grew up in the early years of Greece re-building its democracy post military rule (Xounda) in the 70's before she moved to Singapore where Lee Kwan Yew, Prime Minister, was activating the most radical society building experiment in South East Asia. She grew up in the world building years of Singapore (80's, 90's & early 2000's) where every day revealed new directions, decisions, and a society being reimagined. There are shadows to any world building activity in a benevolent dictatorship where shared decision making is conducted by the few on behalf of the many. The unique approach of Lee Kwan Yew built a pragmatic dynamic governance system that benefited the many. Aliki will describe how she is disrupting the power structures in the context of a doctoral student seminar where principles of dynamic governance influence world building processes by combining tools of pragmatic imagination (Pendelton-Julian, 2017) and principles of sociocracy to discover new approaches to transforming complex problems at multiple scales.

Alexis Kokkos is Emeritus Professor of Adult Education at the Hellenic Open University. He contributed to the establishment of the institution of Popular Education in Greece and the national program of Training the Trainers of Adult Education. Alexis is the Chairperson of the

Hellenic Adult Education Association. He created the method "Transformative Learning through the use of Aesthetic Experience", which runs under the auspices of UNESCO. Alexis has intensively explored the association of Jack Mezirow's Transformation Theory with the perspective of other important scholars to identify how the interconnections among various theoretical perspectives may contribute the development of a more integrated theoretical framework for learning for change. A product of this work is the book he edited "Expanding Transformation Theory: Affinities between Jack Mezirow and emancipatory educationalists". Alexis will explore the convergences between the sociocratic perspective and the theoretical traditions of transformative learning.

Renee Owen is an Assistant Professor of Education Leadership at Southern Oregon University and was an early adopter of sociocracy in her previous work as a K-12 school leader at Rainbow Community School in Asheville, NC. Through the process of transitioning her school to sociocracy, she witnessed how sociocracy can be a catalyst toward decolonizing school systems to be more equitable, partly by transforming school culture to become more reflective and inclusive of all voices and perspectives. Renee received her EdD through the AEGIS program at Teachers College, Columbia University – a program developed by Jack Mezirow – and her scholarly research focus has been in transformative learning ever since. In particular, she is fascinated with sociocracy as a catalyst for transformative learning – something she has written about with John Buck. Renee joined the ITLA in 2018 and became a member of the leadership circle to help ITLA transition to sociocracy, a process that has been so inspiring that she has become a sociocracy consultant and facilitator through GovernanceAlive.

George Koulaouzides is an Assistant Professor of adult learning and education at Hellenic Open University, Greece. He is a mathematician who developed an interest in research methods that contradict the positivist paradigm. George's quest for more subjective, individualistic, and hermeneutic processes for understanding social reality ended in him embracing biographical and autoethnography research to develop an interpretation of human learning. His personal epistemological transformation facilitated his understanding of transformation theory and led to him spreading this theory in the adult education community in Greece through translating the works of major scholars of the field. George is also an active citizen involved in local political and social processes. When he realized the potential of sociocracy, he introduced it to the local administration authorities who decided to adopt sociocracy for creating of a Municipal Youth Council. George will share his experiences from his effort to change the hierarchical – vertical governance minds of local administration authorities towards adopting sociocracy as a formal governance framework.

Claudio Melacarne, who is an Associate Professor teaching *Foundation of Education and Theory* and *Methods of Educational Consulting* at University of Siena, is experienced in designing and managing educational programs in universities and in workplaces (VET). Typically, these adult education organisations use hierarchical structures that do not allow people to participate in any phases of the innovation process. Moreover, managers have commonly only 'one way' to know and face the complexities. In this context, sociocracy needs to be experimented with as a new way to build a more open, clear and democratic governance in academia by starting to use sociocracy parallel to existing governance in some activities. Claudio will share his experience of using sociocracy to govern a part of the PhD Program "Learning and innovation in social contexts and workplaces".

We will complete this symposium with inviting each participant to share their perspectives of how sociocracy could facilitate transformation of adult education and could be implemented in adult education, and a Q&A round. Actions and policy implications that are likely to emerge include participants exploring sociocracy as governance approach in their adult education organisations, contributing to turning the tide and higher education fulfilling its transformative mandate again.

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