

# QUALIFIED TO SURF CHAOS: A SELF-DETERMINED DEGREE

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## ABSTRACT

Heutagogy is an approach offered in adult education which is based on learner determined learning, which recognizes transformative learning processes that go beyond a teacher-delivered focus on content. The development of a new programme is described that is explicitly designed to be learner determined, including the articulation of the learner's subject area. Questions for further development and research are discussed.

## INTRODUCTION

This paper explores the role of curriculum in a programme of study designed explicitly according to heutagogical principles. Mann et al. (2017) examined the nature of heutagogical education with a case study of a suite of qualifications for experienced professionals offered by Capable NZ. A new programme with Capable NZ is intended for learners without this extant professional experience. This paper explores the curricula design to enable self-determination in education.

Hase and Kenyon (2000) defined heutagogy as the study of self-determined learning. It applies a holistic approach to developing learner capabilities, centering learning as an active and proactive process (Blaschke, 2012), with learners acting as "the major agent in their own learning, which occurs as a result of personal experiences" (Hase and Kenyon, 2007, p112).

Hase and Kenyon (2007) described heutagogy as a "child of complexity theory". Anderson (2010 p39) described how complexity theorists are often at odds with positivist researchers and educators, who attempt to eliminate or control all the variables that influence learning. Rather, complexity, and hence heutagogy, seeks to create learning activities to allow effective behaviour to emerge and evolve. McElroy (2000) noted that "the point at which emergent behaviours inexplicably arise, lies somewhere between order and chaos" (p196). This sweet spot is known as the "edge of chaos (where) complex systems innovate by producing spontaneous, systemic bouts of novelty out of which new patterns of behaviour emerge" (after Kauffman 1996). Crucially, heutagogy implies a different relationship with the curricula. Hase and Kenyon, for example (2007) describe how heutagogy goes beyond andragogy's focus on adult education with self-directed learning linked to experiences to a different relationship with the curricula "we thought that andragogy did not go far enough...curricula were still very much teacher-centric with little opportunity for any real involvement at a micro or even macro level by the learner" (p112).

Hase and Kenyon (2007) derive design implications for heutagogical education that included the "recognition of emergent nature of learning and hence need for a living curriculum as key driver" and "involvement of learner in this living curriculum" (p114). Similarly, Blaschke (2010 p64) described the need for a

"flexible curriculum: In a self-determined learning environment, the learner is the driver in creating flexible curriculum, which is defined by the student: learners create the learning map, and instructors serve as the compass"

In the case study of Capable NZ's suite of programmes (Mann et al. 2017), the approach taken was an Independent Learning Pathway. Capable NZ works with learners to recognise and extend learning in a professional work-based context at both undergraduate and post-graduate levels. At undergraduate levels Capable NZ works with learners to align their professional framework of practice - their professional identity - with graduate profiles. These learners are expected to learn new areas, mostly to wrap their practice in theoretical context, but there are no formal classes. Instead the focus is on an individualised supportive environment for personal reflection.

The alignment of the learner's professional framework of practice with the qualification's Graduate Profile provides the basis for the Independent Learning Pathway. In a sense, this provides flexibility of curriculum by avoiding a traditional curriculum that focusses on a body of knowledge that comes from a discipline. Instead the body of knowledge is accessed through the learner's professional experience. This extant professional experience is not available to the learners of a capability degree.

So the question for this paper is how to structure a programme to allow for learners to self-determine the curriculum and their intended occupation, but to do so from a position of limited professional experience?

## **BACHELOR OF LEADERSHIP FOR CHANGE**

### **Positioning**

Figure 1 shows the positioning of the BLfC in terms of prior experience and the level of self-determination (adapted from Mann et al. 2017). The BLfC (third from top), like the existing Capable NZ programmes, is an individualised learning journey – if it were duplicated for each learner, there would be different collections of little blocks making up the graduate profile for each learner to represent different individualised learning journeys (so too are the post graduate programmes but they are research/enquiry based, the relevant comparison here is with the prescribed blocks of the traditional taught programme).

The BLfC assumes no prior experience. There are some elements of looking back, primarily in the development of understanding of personal values and identity. The graduate profile is closer in style (not level) to that of the post-graduate programmes, but the learner is supported to use an Emergent Professional Framework (operationalised throughout the degree as an "exit strategy") that helps them define and explore their own career framework of practice. Unlike the traditionally taught degree where the learning experiences are pre-bundled and arranged by subject area, the BLfC is arranged by a progression of capabilities. While some capability development is likely to be 'pre-packaged' e.g. development of enquiry capabilities, the bulk of the learning will be through curated experiences and group and individually negotiated projects are framed by the individual's developing capability framework.

The BLfC provides an independent learning pathway for learners who have not had significant previous work-practice experience. In some ways this requires a hybrid between the Capable NZ focus on reflection on experience in work-practice, and the designed learning experiences of a traditional taught programme. In the BLfC's case, the learners do not have the professional experience to look back on, but neither can we pre-prescribe subject-based courses leading to a specific discipline (even if we wanted to, heutagogy notwithstanding) - we instead curate a set of experiences for the individual learner/s.

Otago Polytechnic Suite of Heutagogical-based Programmes  
(along with RPL and traditional taught),

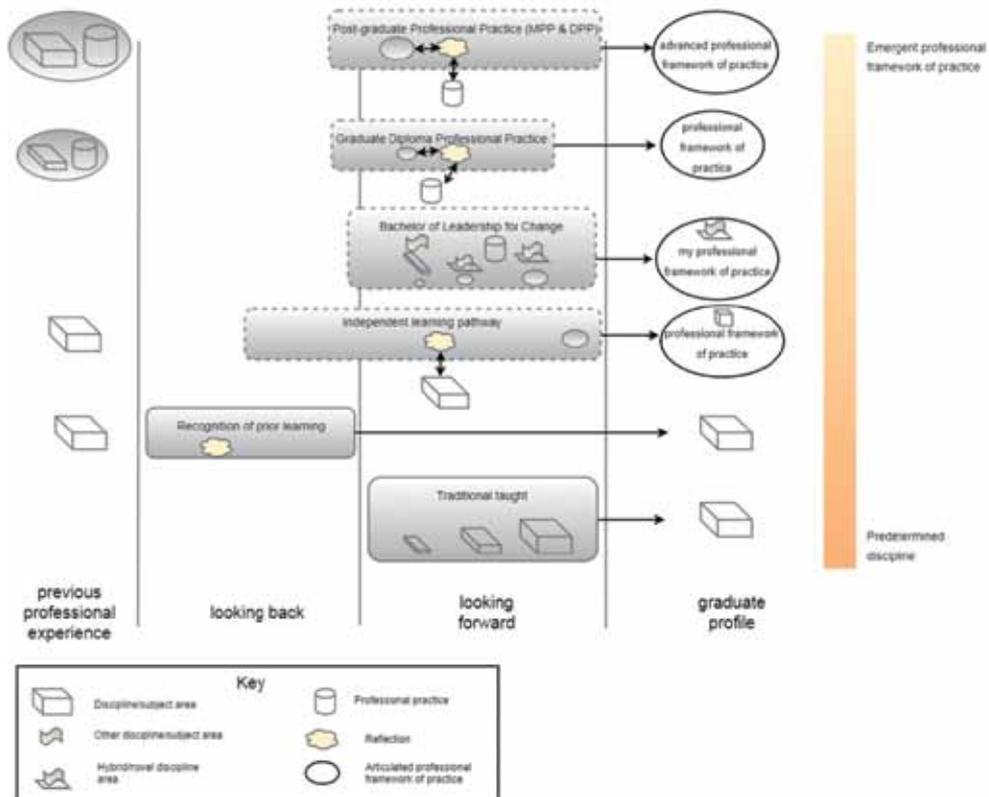


Figure 1: Qualifications designed for heutagogical delivery, from top: DPP and MPP; GDPP, BLfC; and ILP (a delivery approach to various qualifications), and for comparison an RPL degree, and a traditionally taught degree (Otago Polytechnic).

## GRADUATE PROFILE

Defining the graduate profile is particularly crucial for the BLfC because we don't have the specific discipline (such as Engineering or Information Technology) to fall back upon. Indeed, the BLfC programme is designed to support learners towards careers in fields or vocations that might not yet exist. In a review of practice and learning, Reich and Hager (2013) pointed out that "practices are emergent, in the sense that the ways that they change and evolve are not fully specifiable in advance".

For these reasons, as well as all the usual employability skills, graduates will also have to be equipped with special skills - those associated with managing their own career (Carpenter 2013) and with developing their own emergent professional frameworks of practice. So the aim of this programme is to prepare graduates to succeed in emergent professional fields for career paths which focus on making a difference to communities, enterprises and environments in a constantly changing global environment, it also prepares people to enter current professional fields (excluding regulated professions) well equipped to adapt to rapid or significant change.

The BLfC learner experience is based on the Capable NZ ILP but with an important difference; a scaffolding of supported experiences replaces the ILP learner's pre-existing experience. In the ILP, the learners are already embedded in the workplace, usually with some sort of pre-existing employment relationship (not necessarily paid). The learners can then use both their experience of work and their on-going work environment to provide the basis for their reflective learning. In the BLfC however, this existing experience of work and workplace cannot be presumed. The programme is structured to provide these opportunities while still remaining true to the principles of heutagogy.

For the Bachelor of Leadership for Change we are using a competency - capability framework (Figure 2):

- Competency: what the graduates can do;
- Capability: how they use those skills when the going gets tough (or unexpected opportunities arise); and
- Meta-capability: Knowing what competencies and capabilities are important for each learner's emergent professional framework of practice.

The crux of the degree is that learners define their own framework of practice which should align with/exceed that of the qualification itself. So, for example, they might define themselves as a "thought leader in values-based marketing". The longer articulation of this framework would include, for example, a consideration of what code of ethics apply (or creating/hybridising one) expected professional behaviour and so on which is then the basis for the competencies of knowing that code of ethics (etc.) and using it in difficult situations. So, rather than this being done in qualification development by experts, the learners themselves are doing it (on the basis of the curated experiences). The articulation of that framework is, then a meta-capability. This includes the capabilities to articulate, test and productively use the capability and competency framework to make sense of and assess the impact of their emergent professional framework. What this means is the ability to understand how all the competencies and capabilities mix to define each learner's own professional framework. This meta-capability forms the basis for each learner's negotiated learning agreement (sometimes called their "exit strategy") from which form the basis of regular reviews and from which their personal learning plan will be derived.

## Graduate Profile:

On completion of the qualification, graduates will be able to demonstrate the following competencies and capabilities to make a difference in communities, enterprises and environments:

1. Apply competencies and capabilities to enable transformational change in communities, enterprises and environments.
2. Integrate an appreciation of the bicultural context of Aotearoa New Zealand and the Treaty of Waitangi within an emergent professional framework.
3. Articulate ethical and sustainability frameworks such that they act as sustainable practitioners.
4. Recognise and incorporate one's own values, mindsets and biases within a grounded theoretical framework.
5. Create and maintain healthy relationships and collaborations in communities and organisations.
6. Synthesise experiences, capabilities and competencies to create an emergent professional framework of practice.

A significant part of the BLfC programme is work-based-practical learning. Portwood (2007) argues the examination of work-based projects suggests that it is 'reflective pragmatism' and the 'principle of productivity' which is at the core of work-based-learning. Raelin (2008) suggested that reflective practice extends WBL beyond the individual to the collective, and highlights reflective practice as a key mechanism for learning and knowledge production. This is supported by Siebert & Costley (2013), who also believe that the provision of a framework that enables a learner to utilise reflective practice, helps learners to make sense of their experiences, which in turn allows them to learn from their experiences. Reflective practice aids learners in developing their knowledge and skills, enables them to build confidence, and guides them in planning and implementing their personal, academic, and professional development.

## DELIVERY

Figure 2 shows the three year structure of the BLfC. It is designed to deliver the Graduate Profile through a progressive series of learning outcomes which balance the tightrope between a pure learner determined pathway and enough structure to provide guidance. The degree can best be considered by starting at the end, the individualised "myProfile: My Capabilities" at graduation. This individualised transcript contains the learner's own articulation of their framework of professional practice. It describes their specific interpretation of the graduate profile in the evidenced description of their specific competencies and capabilities. Evidence is provided that links to work-based experience that they have in demonstrating those attributes (this is directly analogous to the assessment of the ILP for the BAppMgt and BSS).

The creation of this "my Profile" forms the focus of the degree. Throughout the degree the learner is facilitated to develop and implement their "exit strategy"; what they want do when they graduate, their first job, and what they will do to get there. This forms the basis for their individualised learning and begins even before the degree starts proper, as part of the entry process.

The Curated Experience and Leadership for Change projects are about the learner experiencing and operating within different environments of work practice.

Figure 2 characterises four types of learning (in reality these are overlapping and integrated with elements of each within each other). All of these operate within a framework of reflective practice.

1. Emergent Professional Framework: this forms the infrastructure for the degree. Regular reflective check-ins develop the exit strategy

2. Curated experience: these might be work-based learning experiences

3. Targeted learning: these are individualised opportunities for learning specific competencies and capabilities. These might learnt via any means including self-directed learning, online resources, and projects or through otherwise scheduled classes (e.g. courses from BAppMgt).

4. Leadership for Change Projects (LfCP): Substantial project work aligned with the learner's framework of practice. Both individual and group projects.

The first year is focused on achieving:

- Understanding and confidence of identity;
- A personal framework of practice; and
- A self-directed learning toolkit.

The Emergent Professional Framework provides an infrastructure that wraps around a series of curated experiences, aimed at exposing the learner to a variety of models of thought. The curation of these experiences will be about creating an experience specific for each learner but taking advantage of collaborative and collective learning of small groups wherever possible. They will mostly be in the form of experiences that scaffold towards the later and more substantial projects. Here, and throughout the degree, learners will be expected to work both alone and in groups, creating a community of practice.

The first block will focus on identity, and could take the form of an intensive residential experience. The identity course serves to give each learner a baseline measure of where they are at with themselves in their personal and professional development. From this baseline, progress can then be measured. Tools such as the 21st Century

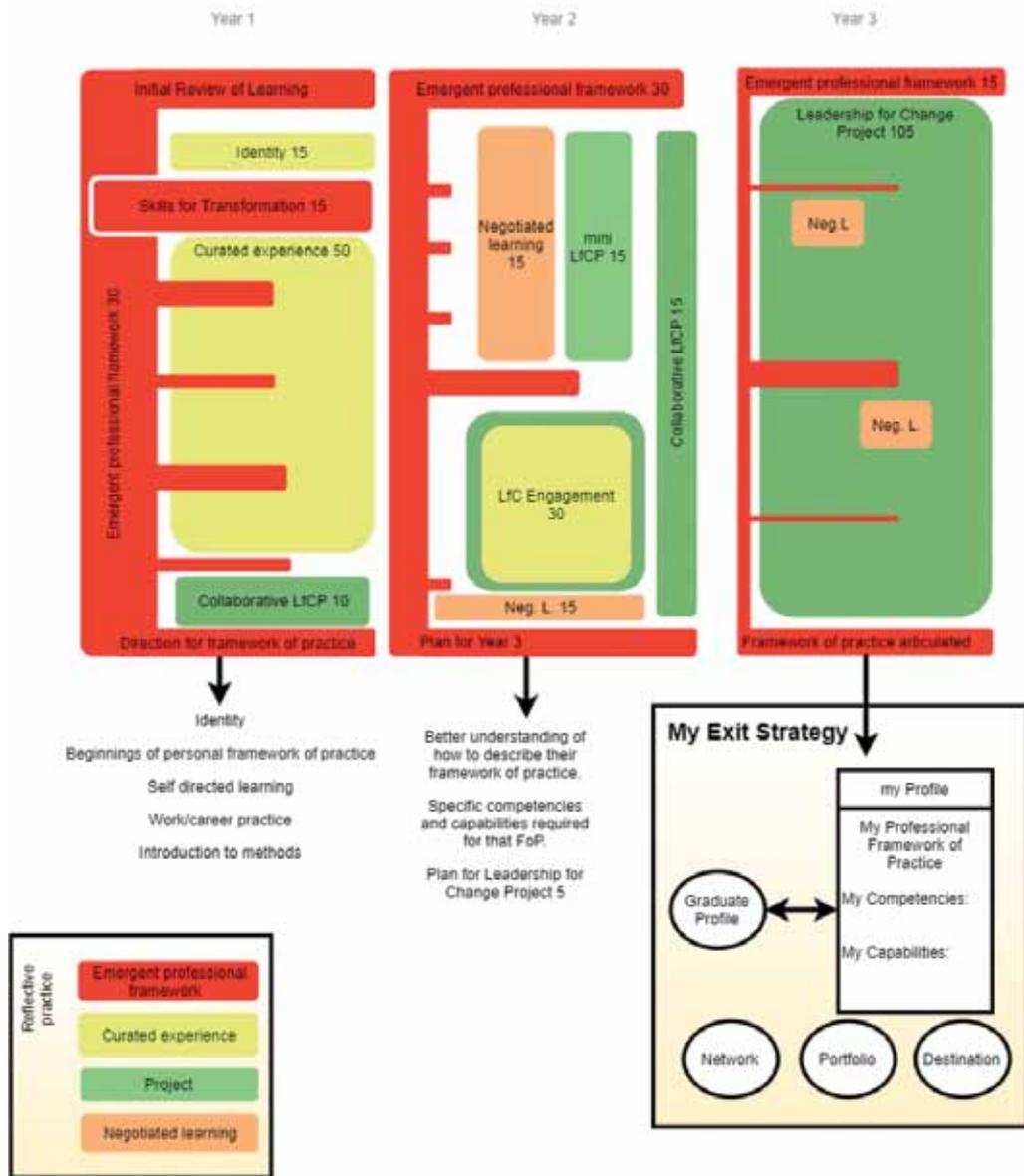


Figure 2: BLfC programme structure

Skills, from the World Economic forum will be used as a way for learners to establish where their strengths and weaknesses lie and identify where they choose to focus for their personal and professional development. The identity course is an impactful and supportive start to the degree.

The Emergent Professional Framework "toolkit" will include building the skills required to successfully undertake this sort of degree, particularly critical thinking and reflective practice. A "Skills for Transformation" block of learning provides an introduction to the specific skills of transformation; communication, collaboration, as well as concepts of resilience and transformation.

The Curated Experience is a purposeful experiential learning activities in which the learning occurs through the experience. A key feature of this that the experience spans a range of models of work practice. It not just the same work done in different places. So, for example, a learner might be interested in working on housing quality, we would ensure that they experienced a range of these – local government, housing NZ, landlord agencies, social service, marae and start-up social enterprise. They might all claim to focus on housing quality, but have very different understandings, theoretical underpinnings, measures of success, etc., which can be characterised as models of work practice. The curated experience can, then include work experiences, community and industry projects and structured problem solving activities if they provide an opportunity for experiencing different models of work practice. By the end of the first year, learners should have experienced a range of these different models of work practice and have some idea of which they have affinity for.

The second year starts with a reassertion of the framework of practice and a consideration of the competencies and capabilities required of the intended graduation framework of practice. The first semester allows for targeted learning wrapped around a mini project. After a significant check-in, the learner will then spend time in an environment that as closely as possible matches their intended third year project and eventual workplace: "Leadership for Change placement". A short burst of targeted learning will focus on any ideas identified during the Leadership for Change placement. Finally in year 2, the learner recaps and reasserts their intended framework of practice and a plan for year 3.

In year three, the Emergent Professional Framework element is reduced further and the main focus of the year is the learner's Leadership for Change project. In accordance with the community of practice, they would also contribute to their colleagues' project in a collaborative fashion (in all three years). The collaborative aspects are purposefully less explicit as the degree progresses. The intention is that collaborative and collective way of working is normalised to the point where this is the natural way of working (but not explicitly required to allow for the possibility of remote individual projects).

The BLfC is a facilitated learning experience. An integral part of the BLfC programme is the identification of learning from experience and the sense-making of that learning as the learners develop a framework of practice. Therefore the role of facilitator of learning is in guiding the learners' critical approaches to learning, and is where their work should begin (Eraut 2008). Boud (2001) similarly argued that the tutor is there to facilitate the learner in their learning through critical reflection. One of the tasks of the early stages of the BLfC is to stimulate learner reflection.

## **SUPPORTING AUTONOMOUS LEARNERS**

Stephenson (1998) considered the implications of supporting student autonomy. He described situations where there is a "transfer of responsibilities" whereby "students have direct responsibility for aspects of their education which are either not often directly addressed within an institutional setting (such as student motivation and personal development), or for aspects which are the traditional preserve of teachers and accrediting bodies (such as the direction, content, pace, location and assessment of the student's studies)". Stephenson argued that this transfer of responsibility brings inherent risks, and that it is the responsibility of the teacher (facilitator in our case) and institution to support learners in assuming these "daunting responsibilities".

This “transfer of responsibilities” can well describe the case of the Bachelor of Leadership for Change. Stephenson described how students, “preferably in association with other students, and in applied contexts” take responsibility for the following, all of which apply to the Bachelor of Leadership for Change learner:

- Formulating the strategy of their overall learning based on an awareness of their own development needs (their strengths, weaknesses and aspirations);
- Devising a programme relevant to that strategy;
- Negotiating approvals for their proposed programmes and access to resources;
- Determining the pace, location and character of specific learning activities;
- Monitoring actual against planned progress and reviewing the continuing relevance of the programme they planned for themselves;
- Demonstrating their achievements, if necessary against external benchmarks;
- Critically reviewing the effectiveness of their overall learning experience and the
- Relevance of their original formulation; and
- Planning the next stage of their development.

Stephenson argued that this transfer of responsibility brings inherent risks (Figure 3), and that it is the responsibility of the teacher (facilitator in our case) and institution to support learners in assuming these “daunting responsibilities”.

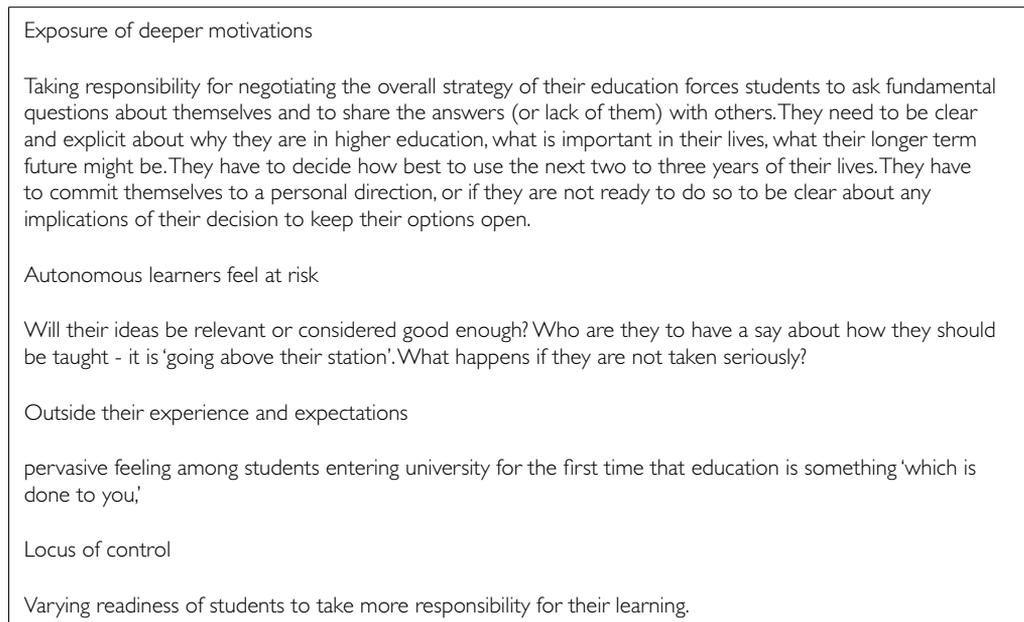


Figure 3: Risks to learner from assuming role of autonomous learners

Fortunately, Stephenson described how strategies for developing independent learning capability can help learners overcome these anxieties and risks. These strategies are embedded in the approach, curriculum, delivery and support (both facilitators and learning support) of the Bachelor of Leadership for Change (Table 1).

<b>Developing a belief in “taking it on”</b>	
<b>Explanation</b>	<b>Implication</b>
<p>Explanation: cycle of legitimization: Three recurring stages acceptance of themselves as persons (I AM); acceptance of their right to take direct actions concerning their own future (I CAN); confirmation that their own actions (or studies) have led to achievements in the field to which they aspire and which are recognized by established practitioners (I HAVE).</p>	<p>Implication for Bachelor of Leadership for Change:</p> <ul style="list-style-type: none"> <li>- <b>Crucial role of the early focus on understanding and affirmation of identity</b></li> <li>- Early establishment and articulation of the <b>end-game exit strategy with on-going collegial discussion with established practitioners</b> (part of EPF course 1 and on-going).</li> </ul>

<b>Supportive and enabling course structures</b>	
<b>Explanation</b>	<b>Implication</b>
<p>Explanation: Autonomous learners need reassurance (for the reluctant) and enabling procedures (for the enthusiast) of a clear course structure with specific tasks, staged outcomes, public criteria for judging progress, procedures for securing help, and advice and ease of access to materials.</p> <p>Few students can enter higher education for the first time with readymade proposals for the programme they wish to pursue. Time must be provided to help students explore their interests and needs. A life-planning 'syllabus,' described as the 'Statement,' with specified staged tasks ... and presented to students as their first major assignment.</p>	<p>Implication for Bachelor of Leadership for Change:</p> <p>The <b>Emergent Professional Framework course sequences</b> are explicitly designed to provide an infrastructure for this learning. The “exit strategy” with <b>repeated check-ins provides the structure for articulating the learner’s individual emerging direction</b>. Within the EPF, learning outcomes (and modules) <b>focus on life/career planning, and specific tools sets such as critical thinking and research methods</b>.</p> <p>The check-ins during the EPF are intended to be both challenging and affirming – navigating this sweet spot takes considerable skill but fortunately is the skill already demonstrated by facilitators in Capable NZ.</p>

<b>Tutor support for learner responsibility</b>	
<b>Explanation</b>	<b>Implication</b>
<p>Explanation: Supporting autonomous learning requires tutors to go beyond their traditional roles as providers of information and assessing performance.</p>	<p>Implication for Bachelor of Leadership for Change: Otago Polytechnic and Capable NZ in particular are well versed in this <b>facilitation role</b> and will form the basis of the “teaching” relationship.</p>

<b>Support from fellow students</b>	
<b>Explanation</b>	<b>Implication</b>
<p>Explanation: On a capability programme, well-managed support groups are particularly important, providing a general culture of interpersonal support where specialist tutorial help is not readily available. In contrast with taught students, autonomous learners have to deal directly with general educational as well as specialist issues. Mixed interest groups can play a positive role in helping students share concerns, explore ideas, exchange experiences and take risks.</p>	<p>Implication for Bachelor of Leadership for Change:</p> <p>For the Bachelor of Leadership for Change, a <b>community of practice</b> will be important. While not the norm for Capable NZ's experienced learners who tend to have a community of practice within their work practice, we have had success with many communities of practice within groups of learners – both with common interests and where groupings are more arbitrary (eg geographic).</p> <p>For the Bachelor of Leadership for Change, this community of practice will be very important. It will be established early with the <b>experiential Identity course, and continued throughout the degree with the blending of curated experiences and Leadership for Change Projects</b>. Leadership through collaboration and collective learning are fundamental to the degree.</p>

<b>A focus on learning learning</b>	
<b>Explanation</b>	<b>Implication</b>
<p>Explanation: One of the most difficult things for autonomous learners is to judge how well they are doing. One widely used approach to this problem is to encourage students to use records of achievement. The better schemes often have titles which convey this purpose, such as learning logs, portfolios of learning and personal review of learning. If being able to manage their own learning is the desired outcome, students need to become conscious of how they learn, to develop the habit of seeking learning opportunities from their experiences and evidence that they can improve performance and understanding through application of lessons learnt from previous experience.</p>	<p>Implication for Bachelor of Leadership for Change:</p> <p><b>Learning how to learn in a self-directed environment is a key outcome of the first semester.</b> This is established with learning how to be a reflective practitioner, and structures such as the exit strategy which provides the basis for the on-going record of achievement. Specific competencies and capabilities for learning are enabled by focus on tools such as research and design methods, communication and team work.</p>

Table 1: Developing independent capability (explanations adapted from Stephenson 1998)

## DISCUSSION

Mann et al. (2017) considered the role of the facilitator (considered in depth in Ker 2017) in the framing of Freire and his emancipatory view of transformation (e.g. 2000) whereby the facilitator works “alongside the student to develop rather than direct the students’ understanding” (Costley and Dikerdem 2011 p38). Anderson (2010 p40) described “enabling learners to surf at the edge of chaos”, and not to “eliminate or constrain the creative potential of actors engaged at this juncture”. Heutagogical education is by necessity surfing at the edge of chaos. This paper has described a qualification explicitly designed to support such surfing.

Capable NZ’s existing ILP programmes (both undergraduate and postgraduate) clearly follow a learner-determined heutagogical approach. For all of these, the learner is experienced and is combining existing work practice knowledge with new learning to articulate their new professional framework of practice. For the new BLfC, despite being explicitly designed as heutagogical, the relationship is a bit more tenuous. Without either the taught class structure or specified content, the self-determined learner could be left with nothing, so the (as yet untested) structure of the BLfC aims to provide a scaffolding within a heutagogical approach. The trick for the facilitators will be to not let this structure intended to help learners inadvertently diminish the value placed on learner self-direction of the learning process.

Mann et al. (2017) concluded with a research agenda which we add to here.

The nature of learning is an important question: did the learners know they were learning? Was it transformative? Did it involve “emotional turmoil”? How can we construct opportunities for learning how to learn that do not become a requirement that sits uneasily with heutagogy? It would be useful to carry out longitudinal studies of learners in these heutagogical programmes. Also, to explore the relationships between transformation in learning and change of practice in the learner (and beyond). These questions about the process of learning have an added dimension for the BLfC when the role of previous experience (or the lack of it for the BLfC learner) is added to the mix.

The relationship between the surfed chaos of heutagogical learning and the expectations of organisational reporting remains a challenge. In preparing the curriculum document for the BLfC we were confronted on multiple occasions with a template asking “is your process A or B?” to which we almost always responded with a “C” (or a “I7” or an “orange” - not even a letter!). Further research should be undertaken on developing organisational processes to support heutagogical learners - a process on engaging learners in ethical maturity, for example.

In a traditional taught qualification there is a requirement that the learner engages with a body of knowledge that represents the scholarship of a profession or discipline. This body of knowledge is validated by the academy and with reference to the professional body (sometimes in a formal manner with the professional acting as gatekeeper to entry to the profession). In the Independent Learning Pathway a generous take on the graduate profile is supported by the recognition that the learner is the expert in their own work and when the learning becomes new learning, the approach goes beyond “about work” to become “in work, at work, for work” (Lester and Costley 2010). This is not the case, however, for the BLfC which is about a future, possibility as yet unknown work. Further research would be useful to model the implications of underlying models here. This would be useful for considering the extension of the heutagogical Capable NZ approach, for example to programme to support recent graduates. Further, while the Capable NZ programmes are post-discipline, and the new BLfC is a process-based degree for emergent disciplines it would be perhaps the holy grail to design a heutagogical degree for a hitherto content-heavy, technical discipline.

## CONCLUSION

This paper explores the role of curriculum in a programme of study designed explicitly according to heutagogical principles. A case study was presented of a new programme with Capable NZ is intended for learners without extant professional experience. This paper explores the curricula design to enable self-determination in education.

This paper is based on a single case study. As such it is limited to describing the experiences of one institution in implementing a heutagogically based approach. Care should be taken with generalizing from this case. Further, no success metrics are given here, and it would be useful to include learner voices, possibly through longitudinal study.

**Professor Samuel Mann** teaches for CAPABLE NZ. Sam's 2011 book "The Green Graduate", subtitled "Educating Every Student as a Sustainable Practitioner", sets out a framework for integrating sustainability into every course of study. His subsequent book "Sustainable Lens: a visual guide" explores the visual narrative of sustainability. This book proposes a "sustainable lens": to act sustainably we need to first "see" sustainably. Sam has a weekly radio show and podcast Sustainable Lens where he and a colleague have conversations with people from many different fields who are applying their skills to a sustainable future. Recent work focusses on the development of a Transformation Mindset. Sam gained his PhD from the University of Otago in 1998 titled "Spatial Process Modelling for Regional Environmental Decision Making".

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