A SELF-DETERMINED LEARNING ENVIRONMENT SUPPORTING CHANGE-MAKERS

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INTRODUCTION

Otago Polytechnic's Bachelor of Leadership for Change is an innovative leadership learning qualification that supports learners in their confidence and capabilities to make positive change in their communities and workplaces. This paper identifies learning from developmental evaluation of the first two years of delivery, sharing voices from a diverse community of learners and the responses of the staff team as they apply the heutagogy principles underpinning the programme. The programme's successes and challenges highlight the transformative potential for culturally responsive, self-determined learning environments to nurture professional practitioners capable of navigating complex, disruptive times and situations.

Mann et al. (2017a, 2017b) have outlined the underlying heutagogical principles (Hase & Kenyon, 2007) and design elements (Blascke, 2010) on which this programme was established following a rigorous two-year development phase and NZQA approval process. These foundations include:

- An understanding of learning as emergent, contextual and collaborative

- A flexible, living curriculum based around learner-generated contexts and content

- Learning contracts and pathways shaped by the learner, with their learning facilitator agreeing what needs to be learned, what learning activities/processes will support that learning, and how learning will be assessed

- A culture of individual and collective inquiry-based learning exploring learners' reflections and emerging questions, to make sense of concepts, context and experiential learning

- The role of the learning facilitator as coach, collaborator and guide, encouraging deeper inquiry and questioning around learners' context, capabilities, mindsets and development needs

These foundations were rapidly translated into practical programme infrastructure from early 2018 when the facilitation staff team and first learners came on board. If learner-centred design was to be lived, then real learners needed to test design assumptions from the outset. While, at its worst, 'building the plane while flying it' is a high-risk endeavour, at its best, learners and staff can enhance their meta-capabilities to shape transformative learning, individually and collectively. Some learners' first leadership learning moments involved realising that "my voice actually matters" in shaping this new programme.

Learners' particular contexts and learning needs provided the basis for customising individual learning contracts, course foci, assessment methods, coaching and collaborative learning sessions. Staff articulated an initial iteration of

the programme's values and expected behaviours to sit alongside expectations documented in course requirements. An early commitment was made to "learn from doing" through an intentional culture of developmental evaluation (Gamble, 2008; Patton, 2011).

This paper briefly outlines the developmental evaluation methodology used to gather formal and informal feedback to systematically inform ongoing programme co-design and evidence learner experience and impacts. The findings present a thematic analysis of the evaluation feedback, the key actions taken in response and further areas for improvement. A discussion of the findings in the context of the original programme design assumptions identifies core features that appear to be working well and where practice-informed evidence highlights new insights and opportunities, especially around the culturally diverse audiences being reached. Finally, the paper situates this learning in the wider context of emerging approaches to teaching practice fit for an age of disruption (Davis, Sumara, & Luce-Kapler, 2015).

METHODOLOGY

Developmental evaluation is an evaluation approach supporting research under conditions of complexity (Patton, 2011). In this educational context, it is as much a programme culture of co-design (Sanders & Stappers, 2008) as it is a research methodology. The programme is emergent, and developmental evaluation places an evaluative mindset at the core of the staff team's practice in order to help track the impact of activities as they happen, to support development, and to guide adaptation and rapid innovation from what is learned (Patton, 2011; Westley et al., 2006). Developmental evaluation differs from formative evaluation which seeks to improve a particular model of practice, and from summative evaluation which seeks to test if a particular model achieves desired outcomes (Patton, 2011). Rather, developmental evaluation provides rapid feedback loops as an innovation is introduced, and supports the early, exploratory stage of an emergent approach. Patton, McKegg and Wehipeihana (2016) provide diverse exemplars of the application of this methodology, including ways to support ongoing development and adaptation of projects, strategies, programmes, policies or initiatives in complex, dynamic situations.

In the title of a key paper, Hase and Kenyon (2007) describe heutagogy as the "child of complexity theory." Developmental evaluation has a similar whakapapa and is therefore ideally suited to this context. The research methods utilised to date have included both informal and formal data gathering and analysis to inform agile, responsive adaptation within the general principles and processes outlined in the initial NZQA-approved programme document:

- The programme *culture of co-design* welcomes learners' input. All the individual and collective learning spaces including dialogue on the programme's Facebook page are sources of informal 'data' which programme staff stay alert and responsive to.

- *Staff team meetings* regularly discuss any informal individual learner or group feedback and immediately translate this into agreed actions – e.g., adaptations of the learning infrastructure.

- All current learners have been invited to participate in a more *formal annual facilitated feedback session*. These have gathered specific feedback on the same specific questions about programme design, success factors, improvement suggestions and impact since the programme's inceptions.

- Another team research project has engaged learners around speculating on the capabilities needed for unknown future worlds they will live and work in.

- More *in-depth staff team planning meetings* held at least every six months, and two visits from the programme's external Monitor, have supported deeper sense-making around this data to inform forward planning and adaptations.

- *Interviews and informal debriefing* with our first graduands about their experience of the programme have also informed our reflections and planning.

The data and the sense-making captured using these methods serve to inform and improve our programme practice, while at the same time enabling us to rethink initial design assumptions and to be held accountable for our intended kaupapa.

In this article, the focus is on communicating learners' voices (all "quotes" are their words) that reflect the dominant themes from across the data, and the responses made by the staff team of four, over the initial two years of delivery from February 2018 to March 2020. Each of our three formal feedback sessions involved seven learners, a total of 21 learners from across three different years of enrolment. The informal channels used have engaged each of our 33 learners enrolled to March 2020. As a staff team, we keep inviting feedback and using our observation, listening and planning skills to translate feedback into programme strategy, culture and infrastructure. In this context, our everyday practice is full of 'data' that informs our reflections and responses.

FINDINGS

Programme culture and design

An ongoing inquiry from our staff team with learners has been: *What's working? What isn't? What's most important going forward?* Learners have consistently affirmed how much they value the programme's flexibility and responsiveness in order to co-design their individual learning pathway and to collectively shape the programme culture and infrastructure. While it was challenging for some learners not to find everything set up before they needed it, others were surprised how much their input was valued and how much they could adapt the programme processes for their 'real-life learning' needs and contexts. They reported a sense of agency within the programme culture as a safe space to experiment with growing their leadership capabilities. "It felt like the degree had been written for me," said one graduate. As one of the staff, I would say, "learners were writing the degree with us."

Yet there are inevitably constraints around co-design. While online programme delivery supports access and flexibility to integrate with learners' work, whānau and community commitments, one of the biggest challenges is the need for some face-to-face contact between learners and staff early on in order to establish a foundation for relationships. Face-to-face 'intensives' over two to three days have been used to build learner confidence, commitment, trust and belonging. Programme and learner budget, time and logistical constraints have made this difficult to consistently achieve. One recent graduate doubted she would have continued with her study without this early relationship-building time.

Significant adaptations have been made, including delivering separate North and South Island intensives; ongoing advocacy for a dedicated, more user-friendly classroom space; revision and redevelopment of the initial course designs, especially to make the "Me and My Emerging Capabilities" course a compulsory entry point for everyone; and redevelopment of the Year 3 programme to achieve better integration of the learners' major "change project" and their articulation of their "emerging professional framework."

Being part of a Community of Practice

Another consistent feedback theme has been the richness of the collective peer-to-peer learning and reflection through weekly classes, guest speaker sessions, learner-led ako groups and informal relationships. The sense of connection with others wanting to make change – not necessarily in the same context or stage of learning – has been highly valued. "Listening to other people's projects and other people's struggles has given me a sense of community."

Not every learner can or wants to commit to classes or intensives offered. Some learners prefer a very individual learning pathway and/or do not actually know what they are missing. More collaborative learning strategies suggested by learners include fostering tuakana/teina relationships more overtly, and providing more "real-world situations with all local students" – especially for learners in the early stages of their programme. As the programme expands, evening sessions may also be worth testing for full-time workers.

Facilitation team

Learners have consistently affirmed the capabilities, diverse styles and leadership experience of the programme learning facilitators. Their engagement with each learner from the "very hands-on and friendly" course onboarding and recruitment to their one-on-one mentoring, the feedback offered, the small classes and the mix of online and in-person contact were all acknowledged as supportive of the individual learner journey.

To increase learner access to the diverse skills and perspectives of the staff team, learners are now supported to change their facilitator and/or have a session with another facilitator occasionally. As one graduate noted, "she could choose the relationships she was comfortable with, for what she needed at different stages of her journey."

Occasional tensions arose early on in staff's emphasis on different aspects of programme requirements. One learner noted that this diversity "can sometimes be enriching, but also cause learners to be caught in the middle" if final assessment expectations are unclear. Year 3 course redevelopment now ensures greater clarity and consistency through staff peer-reviewed milestone reports. Regular moderation and staff team development has also supported more consistency in interpreting assessment requirements.

Bi-cultural practice

The programme expects all graduates to be able to integrate an appreciation of the bicultural context of Aotearoa New Zealand and the Treaty of Waitangi within their professional practice. The staff team is committed to integrating bi-cultural practice into programme culture. They have consolidated some use of te reo and tikanga by doing the "Te Reo in the Workplace" micro-credential together. Weekly sessions were set up for learners who identified as Māori, and another for tauiwi learners to explore what bi-cultural practice means for them and to raise their awareness of te Tiriti o Waitangi, te Ao Māori and (de)colonisation. As one tauiwi learner commented, "just having an awareness [is important], because before it was pointed out to me, I didn't even notice it was missing in the first place."

While these commitments have been important, there is always room for improvement. Māori staff capacity has grown to 10 percent, but more Māori staff capacity is needed to better integrate Mātauranga Māori learning resources, provide a supportive learning space for Māori learners and create a deeper culture of bi-cultural practice across the programme. Staff and learners agree that noho marae are needed, and the first will happen in 2020. All students are expected to have some basic education about te Tiriti as a foundation for bi-cultural practice, although access depends on the geographic location of the learner.

The strongest evidence of the programme's success in this area is that half of our first ten graduates identify as Māori. The self-determined nature of the programme culture has been reported as a key factor supporting their success, where other educational experiences have not (Donoghue-Cox et al., 2019). As one graduate commented, "for the first time in my tertiary education experience I didn't need the formal student support services because the programme culture itself catered to my needs."

Of particular significance was one Māori graduate whose leadership for change focus was decolonising the education system. She was prepared to take the risk of not getting her own tohu/degree for the sake of advocating for how our assessment processes needed to change to recognise Mātauranga Māori and the different forms within which this knowledge is expressed. The outcome of her advocacy was an agreement that she would produce videos suitable for communicating her findings and a written piece on why oral assessment is important for recognition of Mātauranga Māori and development of inclusive, relevant Aotearoa learning cultures and processes. (Her findings are shared in this issue of *Scope*.)

This challenge to change assessment requirements was never about this learner not being capable of presenting her work in written form. It was a far more complex task, which gave her the tools to change the education system and provided a more meaningful way to communicate her findings to her stakeholders, while meeting assessment and evidence requirements. The assessment experience highlighted the importance of learners being able to have their knowledge and skills recognised through assessment processes that are practically relevant to their context. At her assessment, her whānau, including two school principals, responded: "That was amazing – why can't more of the education experience be like this?"

Catering to a diversity of learners

Another ongoing inquiry with our learners has been: *How (well) have you and the programme responded to learning, cultural and emotional barriers when the programme hasn't met your needs?* Learners bring diverse life experiences, perspectives, strengths and past wounds to this programme, which are both complex and challenging.

Learners have appreciated the strengths-based learning approach, the availability of Advanced Standing to recognise their diverse prior experience, the "culture of praise for different answers compared to previous education experience of one right answer expected." One learner expressed their surprise at how assessments were "enjoyable and relevant to real life – flexibility [is] catered for and helped build confidence."

Holding an inclusive learning space for diverse worldviews and learning needs has its challenges. There is an inherent tension between safety and stretch outside comfort zones, both of which are often necessary for deeper learning. Unacceptable behaviour has had to be challenged at times and, in these moments, deeper individual and collective learning arises. One graduate described her programme experience as like being in a wananga: "Traditional wananga created dark learning spaces where all the senses are evoked. It's a space that's uncomfortable but supportive and safe for deep, emergent learning."

She cautioned against trying to "protect students from the times of floundering in the dark. Learners need to learn to let go some of the structure they have been used to and to learn to work with the uncomfortable and the emergent spaces."

A key programme development issue is how much structure and scaffolding is needed for learners. How do we value the experience of working with the discomfort of the unknown to find new direction? Is learning to lean into such challenges a key part of growing meta-capabilities of learning to learn? A key focus in the first course, "Me and My Capabilities," is on induction support, whakawhanaungatanga and strategies for connecting new learners to the learning community. Facilitators then discern how much additional support is useful, case by case, holding the tension between "neglect and effective support." In 2020 a clearer scaffolding of content is being trialled for weekly class workshops alongside further resource development work. As the programme scales, this question will be central from a staffing and resourcing perspective as well.

Outcomes

Significant learning and development has been self-reported and evidenced by learners against all the graduate profile outcomes. One of the most common phrases mentioned is "learning how to be more comfortable with the unknown and unknowable." Learners have reported increased abilities to think critically, solve problems and fail forward. They described increasing confidence to act ("getting bolder"), learn/unlearn, grow, adapt to change, and gain new understandings about how to lead and be authentically themselves. "[I'm] learning to create vision for change that is bigger than my own participation; learning to lead differently and see new models for teaching." Others mentioned embracing and using their capabilities more effectively, learning about reflective practice and how to manage self-care. Others reported "discovering the power of frameworks" and "becoming aware of the individualistic lens through which I view the world." At a practical level, some reported gaining competencies in financial literacy and presenting in front of others.

It is too early to assess the lasting impact on the wider community of these new learner/graduate capabilities, but some outstanding results have already been achieved. Before graduation, learners were reporting their sense of improved ability to engage with others, manage anger, convene challenging conversations, introduce different processes and encourage others' leadership: "I've matured in my clarity of vision and planning of execution." One commented that "self-growth is the hidden golden thread running through the programme." In many ways, the programme is providing a transition space for learners as they "start a new chapter in life," with new capabilities and confidence in their kete.

During 2020 Covid-19 lockdown, one graduate commented: "I feel so fortunate that we were able to develop our team for my project, but even more grateful now." The fruits of their Year 3 project, building the capacity of their volunteer crisis intervention team, were being harvested – "and boy, is it going amazingly well. Our team is so confident and so prepared to step up. Luckily I am a 'Leader 4 Change'." These reported learner/graduate outcomes and experiences suggest that the programme foundations are indeed supporting core capabilities needed to navigate in this age of disruption.

DISCUSSION

The findings suggest that the "why" programme purpose is totally relevant, even more so in a post Covid-19 labour market. The overwhelming feedback from learners, staff and external monitoring supports this heutagogical approach, which provides a transdisciplinary, collaborative and self-determined learning environment that is modelling and nurturing leadership and learning capabilities for professional practitioners to navigate and influence a rapidly changing world. It is suiting people at all stages of life looking to grow, 'pivot' and/or deepen their professional practice.

The findings suggest that the original design of the "how" learning infrastructure has been largely effective, and flexible enough to adapt. Intensives are a crucial design element that need to be more fully embedded as soon as possible. Growth of more indigenous knowledge resources, deepening tikanga, and growth of a more culturally and gender diverse staff team will support the programme's ability to scale up and hold the strengths of its design to date. These findings affirm many if not all of the initial programme design features expected to support success (Mann et al., 2017b).

Self-determined learning within an undergraduate degree is being welcomed by many of the learners whose needs have not been met by other theory-based or discipline-specific qualifications. The ability to determine a study programme relevant to their learning needs and negotiate the approvals and resources necessary to implement it, is both a welcome opportunity and a challenge for some to learn how to make the most of such freedom. Learners must learn to navigate complexity, including how to monitor progress and evidence outcomes and to adapt their plans to the realities of their project contexts. Critical reflection and collaborative knowledge sharing are both key elements of the learner experience, which some are more ready to embrace than others. Curating suitable learning experiences when learners do not always have an established workplace adds to the learning opportunities and challenges, yet builds vital capabilities relating to growing context knowledge, trust relationships and students' own mana.

In terms of the "what" curriculum content, this was never intended to be pre-determined. One example of this 'living curriculum' is the learner presentations of their work to classes, which provides rich opportunities for witnessing and learning from each other's practice. Some tensions in the dance between "the designed and the emergent" (Davis et al., 2015, p. 218), which are inherent in this different culture of education and teaching practice, are apparent from the research findings. Some learners need more structure to support their learning towards the expected graduate outcomes. A more structured operating rhythm is now in place for weekly class workshops cycling through relevant frameworks, resources and activities aligned with the graduate profile. While a pool of resources that learners and the facilitation team can draw on is growing, the core teaching focus is on what Davis et al. (2015) describe as extending consciousness and growing personal flexibility, deeper context understanding and

interpersonal capabilities. In this way, it provides an example of teaching practice itself being disrupted and adapted for better fit with the time and place we find ourselves in.

The key finding that differs from the original programme design relates to the "who" audience. This element was almost right, but not quite. Almost all the personal profiles that shaped the programme development phase have been reflected in the learner enrolments to date. The demographics, however, have been different than expected, with fewer school leavers (despite primary marketing to this audience), strong interest from the 30+ age group and more Māori and Pasifika learners (especially in initial intakes) than originally expected. This points to a wider market than originally envisaged and a unique opportunity for a "living leadership learning laboratory experience," containing a diversity which better reflects wider society. Conversely, the challenges that the youngest learners experience flags a major caution if this was primarily a programme for school leavers.

Of all the key risks and issues anticipated by Mann et al. (2017b), the one that is still a significant challenge is the readiness of some learners to commit, be vulnerable and take responsibility within a self-determined learning space. This has been especially true for some of our younger learners, and others who have come from very teacher-led pedagogy experiences. A minority of learners struggle to grasp the responsibilities that come with the freedom of self-determination. Three years is a relatively short period to learn critical self-reflection and self-determined learning capabilities if it is completely new territory. While scaffolding is being offered within the heutagogy approach, it is too early to know how much this will assist momentum in breaking free of stuck behaviours, or whether the entry criteria and/or structure of the programme need to address this issue more directly.

On the other hand, expectations have been significantly exceeded around the programme's ability to cater well for Māori and Pasifika learner achievement, evidenced in 70 percent of graduates to date being from these cultures. Further, a significant proportion of other learners report that the programme has broken down barriers for their tertiary learning engagement in transformational ways.

Overall, these findings suggest that some key conditions for success are already well embedded in the programme development:

- A clear heutagogy approach that supports self-determined, capability-focused, work-based learning from a transdisciplinary foundation

- A staff team drawn from diverse disciplines with leadership and adult learning facilitation capabilities, embracing a shared commitment to the programme values and culture

- An active Community of Practice that engages learners at different levels of learning and with diverse perspectives, ages, cultures, gender, abilities and identities

- A flexible, inclusive and biculturally responsive learning environment catering for those who have not thrived in traditional education modes or simply find this one more relevant

- Assessment processes for recognising learner capabilities that are meaningful for the 'real world' contexts graduates are working in

- A culture of ongoing inquiry-based learning for capabilities needed individually and collectively for future world(s) of work, whānau and community.

The professional practice focus of the Bachelor of Leadership for Change is on growing active citizens confident and capable of making a positive difference in their communities and workplaces. The self-determined learning environment provides an immersion experience in wayfinding leadership (Spiller et al., 2015) that mirrors the complexity of the wider ecosystems that learners are seeking to navigate and influence. The programme culture of

education and teaching practice embodies many aspects of what Davis et al. (2015, p. 4) call Systemic Sustainability Education, a new "moment" in historical education trends as "teaching is coming to be seen in terms of helping to develop awareness of self, others, humanity and the more-than-human-world.

CONCLUSION

There are many other exciting research opportunities to explore around this programme's development – for example, to further understand the lived practice experience from the staff's perspectives; the impact on learners and those they work with after graduation; the capabilities our learners see as necessary for their future. The intersection of self-determined learning with Mātauranga Māori and the potential of heutagogy to enhance tino rangitiratanga of Māori learners is ripe for further inquiry. A longitudinal study would be an ideal vehicle to continue to monitor this programme's processes, outcomes and impact. For now, these initial findings provide some glimpses of how this initiative is providing an innovative addition to the Professional Practice suite and Independent Learning Pathways that Capable NZ has pioneered, and its contribution to transforming how learning and active citizenship are enabled.

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