

The Metagogy Theorem: A Framework for Educating Adults

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[Abstract] This chapter presents the Metagogy Theorem in which Blended Shore Education (BSE) was expanded from a three-year research project. Metagogy is an essential framework for developing and implementing education programs across cultures, ideologies, nations, content, and time. BSE emerged from an international action research project (Strohschen, 2009). BSE originally provided a framework for blending practices that interdependently guide teacher and student to implement contextually appropriate education programs within a “culturally reflexive consciousness” (Gergen in Strohschen, 2009, p. x).

[Keyword] blended shore education; metagogy; emancipatory education; adult education; program design and development; critical reflection; phenomenology

Background

In an investigation into worldwide education praxes (Strohschen, 2009), we analyzed and codified a Blended Shore Education approach (BSE). The philosophical concept of BSE is scaffolded by the principles of Stanage’s phenomenology for adult education research (1997). BSE is anchored to Freire’s values of liberatory/emancipatory education (1970) and Brookfield’s critical thinking about paradigmatic assumptions (1995). The goal of the *Handbook of Blended Shore Education* was to nudge practitioners to consider and re-consider the variety of meanings of teaching and learning and reflect on the relationships and roles of all participants. BSE called for dialogue *within and about* critical analysis. A principal goal of BSE is to clarify assumptions and values about cultures, learning/teaching preferences, and needs for education programs for adults in all of their diversity and contexts (see also Strohschen, 2014).

For the *Handbook*, we examined the trends, practices, and challenges as colleagues from around the globe described these. Stephen Brookfield pointed out that the *Handbook* creates “[...] a conversation that attempts to develop guidelines for adult program development that are sufficiently generic that they allow for discussion and comparison across extremely diverse cultural, ethnic and organizational contexts, yet that also incorporate highly specific indigenous knowledge and practice and that are shaped by local cultures, traditions and imperatives” (personal correspondence, 2009).

The research findings clearly pointed toward the concept of a Metagogy that eventually led us to the development of the Metagogy Theorem (Strohschen & Associates, 2017). While BSE gave us a set of guidelines within which to determine appropriate practices, the Metagogy Theorem gives us an approach for facilitating learning within contextually developed, relevant education methods by, with, and for adults.

Philosophical Underpinnings of Metagogy

Freire's Principles: Teaching to be Free

At the heart of Freire's version of critical pedagogy (1970, 1998), is the emancipation of the mind. Interpreted in many ways over the decades since popular education was introduced into the North American context, emancipatory education remains for many an *either-or* proposition: one is *either* for the oppressed *or* against them. When one considers Freire's Judeo-Christian values, this dichotomy is logical. Yet, in his writings and actions Freire proposed ---and lived--- values of equity, compassion, empathy, and love for his fellow women and men. Learning with and for one another in dialogue commands mutual respect; a praxis of education based on clearly identified and made transparent values, which he considered informed action; weaving experience with education in that he elevated informal to the formal; and the well-known conscientization, i.e., the intentional and deliberate development of consciousness by means of education, but a consciousness that leads to taking the power to transform reality (Taylor 1993, p. 52). These are essential elements Freire's vantage points on education for adults. As complicated as reading Freire may be if one does not already share his values and beliefs, his are rather simple approaches that are understood by many a disenfranchised person. These aspects of his education philosophy connect with educators who deem emancipation for adults to be the goal of Adult Education, and who consider Adult Education a process for mutual learning and transformation.

Stanage's Principles: Consciousing and Constituting

We do not teach subjects. We teach adults sums up Stanage's vantage point. In his landmark contribution to the field of Adult Education, Sherman Stanage (1987) made very clear that the subject of adult education is the leading forth of the capacities, talents, and examined selfhood of the adult. Stanage applied principles of constitutive phenomenology to describe a process of *eduction* of person (underline intended) through "feeling, experiencing, and conscousing" (1987, p. 328), as shown (see Figure 1 below).

Fig. 1 Model of Person

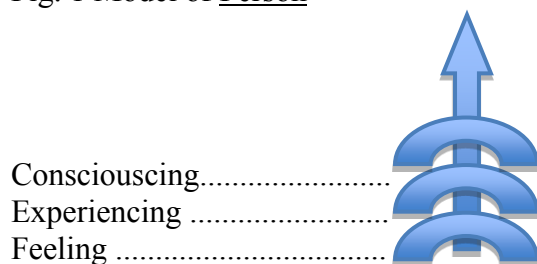


Figure 1. Model of Person

(Stanage, 1987; Graphically adapted by Strohschen)

In the mutual process of *eduction* teacher and learner can examine of how we reinforce prevailing values if we were to forego critical thinking and radical analyses of our assumptions. *Eduction* entails a letting go in the cognitive and affective domains to free one's Self so to get to the root of beliefs; at minimum to learn how to bracket deeply held perspectives long enough to

analyze them. Clarity about one's and others' values is of the essence if we are to gain the capacity to engage in rigorous question-posing with the goal to find personal and societal solutions to needs, ~isms, and issues together and move to action. Clarity, or liberation from the mind only, is *the* essential of *eduction*, irrespective of what we seek to become clear about because underlying any to-be-examined-content-or-value is the absolute necessity to know Thyself. Sound familiar? Throughout humankind's history in the arts and sciences such has been a fundamental belief across cultures. So, too, does Stanage's adult *eduction* call for answering the questions: Who Am I; What Can I Know; What Should I Do; and What May I Hope.

Sherman shows (1987) how the recurrent examination of feelings, experiencings, and consciencings creates our personhood, within the context of dialogue about the states of being aware of one's own and others' perception of realities; each time, a moment at a time, in a given context, and not only with our *Geist* (mind) or mind-generated *Wissen* (knowledge). Krishnamurti (1974, pp. 29-30) richly described the shortcomings of mind knowing, which keeps us in a cognitive treadmill without going anywhere other than through the emotions of motion. The more we think about *what was and what will be*, we lose the essence of *what is* in the moment. And although such thinking prevails, he makes clear how awfully difficult is *to become* in the future when we do not grasp who we are in the present.

This concept of Adult Education does not call for facilitating transformation but for supporting recurring and continuous *being and becoming*. With that, this *eduction* of adults elucidates how we actually strengthen an ego-self when we merely reproduce the thinking, language, and values in our education of that which oppresses transformation.

Weaving the Principles of Blended Shore Education and the Metagogy Theorem

The values and systems of static knowledge delivery do not match the needs of today's dynamic, globally interwoven environments where information doubles at nano-speed and change is the new constant. "In our information-rich, knowledge-based societies, teachers and students must possess the kind of knowledge, skills, and attitudes that aids them in making appropriate and context-driven decisions" (Strohschen in Heaney, 2015). Critical reflecting and thinking capacities are essential elements for the 21st Century Educator (Strohschen & Elazier, 2005) and have been part of our adult education knowledge base for decades, albeit in myriad manifestations. The needs of Adult Education throughout the world changed mid-Century in content and process as Mead already advocated in 1951, calling for "a teaching of a readiness to use unknown ways to solve unknown problems" (pp. 40-41). In our rapidly changing environments, problem-posing and decision-making require clear and critical analysis capacities building rather than teaching rote repetition of established ways and facts *only*. In 2006, Gardner framed "five minds for the future" as pivotal "if we are to thrive in the world during the eras to come" (p. 1). He promoted the knowledge of traditional liberal arts disciplines; the ability to synthesize information and experiences; a venturing into creating new questions and solutions; an extending respect beyond tolerance of differences; and the need to ethically engage in good citizenship.

Blended Shore Education called for facilitating the kind of learning-how-to-learn skills (Smith, 1987), fundamental to sketching a roadmap for adapting teaching and learning approaches to contemporary international, technology-supported, and intercultural contexts. At the same time, BSE maintains that contemporary changing attitudes and needs ought not lead us to throw out what we know and to dismiss decades of research and experience that generated teaching and

narrated by the four authors for the duration and purpose of critical reflection and radical analysis. Because education philosophies and cultural values and assumptions vary, disparate definitions will and should emerge during such reflection or (re)consideration. The intent is to clarify the varied definitions and meanings of the concepts, tenets, and principles within each pillar theme to become aware of how personal culture, narrative, and experience color our lenses. The hoped-for outcome of inquiry into critical reflection and the discourse about the values, concepts, and definitions inherent in these pillar themes is a deeper grasping of self-awareness and clarification of one's own values and assumptions, which can be significant individual and institutional barriers to relevant and contextually appropriate design. Once examined, practitioners are, it is expected, capable to clarify from which platform to design and deliver education programs, and why. This re-consideration is suggested to be a recurring activity imperative in appropriate development and delivery of education program for adults because each program and setting necessitates a contextualized approach.

The BSE Learning Teaching Spectrum

First conceptualized by Strohschen & Elazier (2005), the BSE Learning–Teaching Spectrum describes the suitable combination of appropriate instructional approaches for a given learning task aligned to the appropriate relationship between student and teacher. In its *metagogical approach* (Strohschen, 2009), the spectrum guides the selection of mentoring approaches and instructional methods; however, not in an *either-or* manner. Instructional approaches do not directionally align in a linear fashion to a trajectory that moves from a dependent to an independent learner-teacher relationship. Selection of instructional approaches is highly contextual and depends on the learning task at hand, the readiness of the learner, the instructional skills of the teacher, and the institutional setting along with related barriers and constraints. The spectrum denotes self-directedness in its *reflexive* selection of instructional approaches wherein learner or teacher *leads* the teaching process, using strategies typically connected to a particular power relationship between them, i.e., from directed to independent. In that, it adds to the conventional interpretations of andragogic approaches and self-directed learning because *any* instructional approach may be appropriate *if* it meets learning objectives, learning needs, and learning preferences and *if* its selection responds to expressed needs.

Each stakeholder in the education process, assuming a role of teacher or student, also spirals through the positions in the relationship category (i.e., dependent to independent) arriving at interdependence. In this way, issues arising from narrowly viewed mastery vs. novice notions or positionality and power concepts can be averted, and phases of the education process can be guided by student and teacher in the manner of social construction intended by Gergen (2001) and within an atmosphere of transparency and mutually vetted values (Strohschen, Begovich, Eiathakul, Heaven, Johnson, Prince Gilbert, Wiggins, & Williams, 2013).

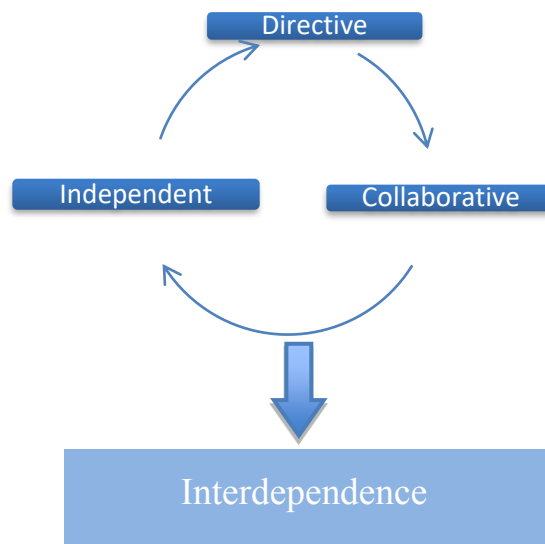


Figure 3. Student-Teacher Relationship in the Learning-Teaching Spectrum

Both student and teacher engage in a reciprocal dance of teaching and learning once they have transparently established the purpose of the desired education program based on identified needs between them in their relationship. The BSE guides decision-making about appropriate, dynamic, organic, and adaptive approaches of program development and delivery for programs. In that way, it provides for fungible, proactive, and immediate responses to the changing demands on and of today's adult student and educator, *irrespective* of culture, location, content, or context.

In the BSE research, it became evident that such relationships and approaches are *universal* in discerning decision points about the process and content of what is to be taught, and to be learned and how and clearly emerged in patterns in the chapters of our associates. With those insights, we later fine-tuned the Learning Teaching Spectrum, initiated in BSE, for the Metagogy Theorem.

The Metagogy Theorem

The Metagogy Project engaged practitioners to describe process, content, and criteria of their practice. From their narratives, we blended the knowledge of the evident *~gogies* in their practices into a theorem, a guiding framework for an Adult Education praxis. The Metagogy Theorem is intended to assist us in selecting appropriate and contextual practices, and it suggests a process for collaboratively developing and implementing methods, strategies, and techniques for educating adults. It acknowledges the contextuality of geopolitical, national, psychological, or other boundaries, and with that barriers to teaching and learning, that we have created and maintained within our sparring ways about whose ideology will prevail and grab all power.

A Metagogy holds the possibilities for bridging the dichotomies and cross the social and personal barriers caused by unexamined ideologies and values. The Metagogy Project, including the findings of the Blended Shore Education action research, created a space to explore beliefs and long-held opinions about education, to cull and polish those cogs and wheels that work, and to use critical reflection and radical meta-analysis to inform how we toil in our field.

Overall, the Metagogy Theorem asks practitioners to engage in the design, development, implementation, and sustainability of learning activities in which they:

- Are grounded in values of social interdependence
- Espouse interdependence as the guiding value in any collaboration
- Respect indigenous wisdoms and see “indigenous” as any one particular groups’ way of knowing and doing that are contextually relevant and meaningful
- Blend such indigenous wisdoms and local knowledge with global standards and practices, *when* confirmed as appropriate by and with stakeholders to synthesize instructional approaches
- Acknowledge the spiritual domain of learning and incorporate delivery strategies that complement cognitive, affective, and psycho-motor domains
- Commit to the emancipation of each self (students and teachers) in a liberatory context of freeing one’s Self from assumptions and values that run counter to emancipation
- Reject homo-social reproduction.

Our philosophical framework is hinged to the firmly planted center post right at the intersection of phenomenology and emancipatory education, principles of Freire’s emancipatory education, Stange’s theory of *eduction of person*, and Strohschen’s BSE. These are joined to synthesize the theoretical framework for program development and delivery in the Metagogy Theorem. The axioms from a global community of adult education practitioners were melded to provide a decision-making process guide for co-constructing, for critical reflection, for radical analysis, and for shared transparency of values to make socially responsible choices in the praxis of Adult Education

The basic premise that led us to Metagogy was simple: those who teach, particularly those working with adult learners, adopt a philosophy and practice, whether deliberately or by default. The facilitators of learning, the teachers, the trainers, the coaches and so on, lean on a variety of *~gogies* --- pedagogy, andragogy, critical pedagogy, etc. In the USA, as much as around the globe, such adult education practitioners actually put many methods, strategies, and techniques into their toolboxes. Yet, when any one of these tools do not work, a next *tool du jour* is applied, too often not with clarity about *why* and *how* to use the tool. The values and approaches we depict with. The Metagogy Theorem give our professional a philosophical and theoretical framework to aid in decision-making in the teaching and learning process.

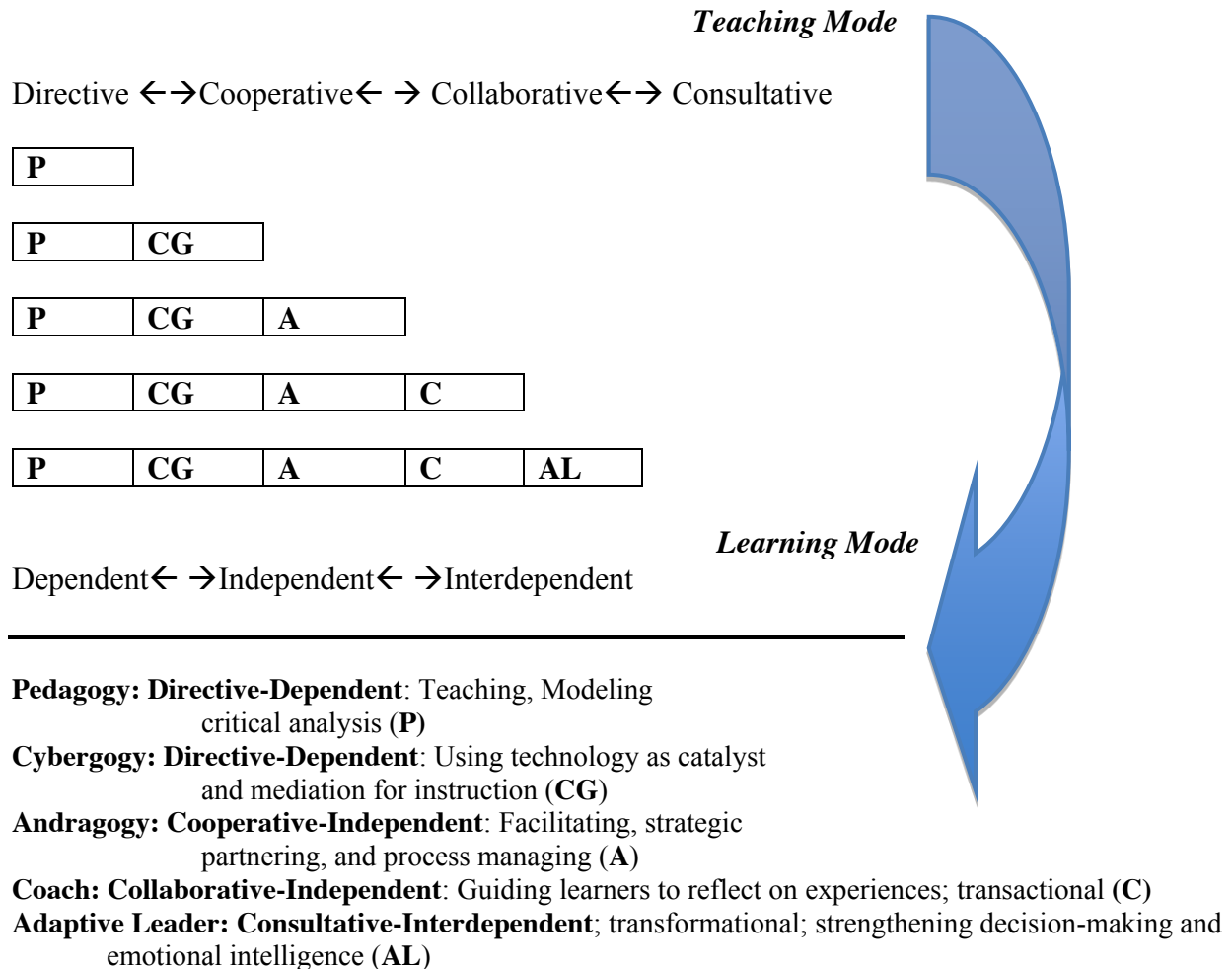


Figure 4. Learning Teaching Spectrum

(Strohschen & Elazier, 2005; Strohschen, 2009. Graphic rev. Strohschen 2015)

- This first basic graphic of the essence of Metagogy sketches key aspects of the adult educator's roles, characteristics, and the scope of the learning process for both teacher and student. It is built on the following:
- The teacher-student relationship has a process-driven focus. With this, it is accepted that there is no one best approach but rather that the teaching approach must fit the learning task at hand.
- Student and teacher are in an egalitarian partnership, which exists regardless of where on the spectrum the learner stands at any point in time with respect to capacity, competence, or readiness. Therefore, both select the most appropriate teaching-learning approach. Collaboration and transparency are pivotal to any selected instructional method.
- The directive to interdependent movement is a reflexive learning-teaching mode and is dependent on the learning task. Student and teacher select the mode based on the self-expressed and discussed statements of readiness and need by the student. Readiness is

defined as that combination of knowledge, skill, and reflected upon experience that a student brings to the task.

- Teacher-student roles are viewed as interchangeable and learner and teacher accept the educator as a transformational leader.

Pedagogy: Directive-Dependent

The pedagogical approach (P), at the point of a directive stance of the teacher works when the student needs information or skills for engaging in the learning task at hand to reach learning goals. Adult students returning to graduate school, for example, may find themselves ill equipped to cope with so-termed academic writing and willingly benefit from workshops on preparing for graduate level course work. Expecting self-directedness and competence at the point when a student ventures into the unknown would be equivalent to giving a person a sailboat, an instructional manual, and a nautical map and then ask them to start sailing across Lake Michigan. But that is exactly what adult educator do. This is in evidence by the lament about students' lack of writing skills we hear in faculty meetings. And, at the same time, our assessment criteria for content teacher on precisely those skills, students have not yet mastered: academic writing. It is relevant and appropriate at this point to use methods and techniques that are directive and pedagogical.

Andragogy: Cooperative-Independent

The andragogical approach (A) calls on the teacher to thoroughly engage the student in decision-making processes about teaching and learning. Students can determine how and when to learn certain tasks and collaboratively move through the learning process with the teacher. In the sailing example, this may play out after basic sail setting techniques have been taught and mastered and students now choose which navigational skills to strengthen next. The student can take responsibility and learn independently from those manuals and maps in preparation of further instruction. In this example, the movement from pedagogical/directive to andragogical/self-directed approaches is iterative and the teacher begin to assume a more consultative role. Learning becomes validated by mastery of the tasks.

Cybergogy: Directive-Dependent

Basically, cybergogy (CG) is an approach that mediates technology as catalyst for instruction. Technology is such an over-used term, which means many things to many people. Internet-mediated instruction essentially means the Internet is a tool; just as PDAs, email, or any social media. We put cybergogy into a category that merely expands on utilization of tools, not too much removed from William Rainey Harper's original correspondence courses, where content and assessments were delivered via postal services. In cybergogy, the teacher has to be versed in instructional design to appropriately apply the available cyber tools, aligned to the task at hand. Cybergogy offers methods and techniques that can be applied across the teaching-learning spectrum.

Coach: Collaborative-Independent

As learning tasks are more complex in that they require greater knowledge, skills, and competencies that students need to bring to the learning situation, the teaching approach moves into a more interdependent context; one wherein the teacher (C) partners with the student and takes

on transactional approaches. Consultant approaches and techniques are increasingly used within mutual consent as the coach engages the student in real life practice. The coach role now requires the student to analyze assessment and the challenges provided by the coach to improve performance, investigate and identify relevant learning-how-to-learn skills, and work on strengthening knowledge and skill independently.

Adaptive Leader: Consultative-Interdependent

Teacher content area expertise, more than in previous learning situations, now becomes less important as process managing of the learning situation is the main competence needed from the teacher. A strategic and consultative partner, the teacher now becomes an Adaptive Leader (AL). She serves as assembler of resources, utilizing the knowledge base of Adult Education with its myriad strategies, methods, and techniques to assess and fulfill the learning needs of the student. This leadership, in the sense of *educare*, intends to guide students based on significant knowledge and expertise – the teachers’ and their students’. Whatever content is to be learned and taught, the aim is to share knowledge and expertise freely. The adult educators in the role of consultant ensure that the student has “hired” them before offering expertise. They make sure students perceive a problem, opportunity or unmet need before offering their expertise. At the same time, they make sure that they, too, understand the problem or unmet need. In these moments in the learning-teaching relationship, the respective grasp of self-awareness and motives of teacher and student ought to be narrated between them. Once this has been accomplished, the student remains in charge of the decision-making process, self-directly choosing learning goals and short-term or mid-range tasks. The *consultant* listens to and acknowledges the student’s resistance to change, should that be the case.

Thoughts

A Metagogy holds the possibilities for bridging the dichotomies that result in institutional and personal barriers caused by unexamined ideologies and values. The Metagogy Project created a space to explore beliefs and long-held opinions about education, to cull and polish those cogs and wheels that work, and to use critical reflection and radical meta-analysis to inform our toiling in the field. The basic premise leading us to Metagogy was simple: those who teach, particularly those working with adult learners, adopt a philosophy and practice, whether deliberately or by default. The facilitators of learning, the teachers, the trainers, the coaches and so on, lean on a variety of *~gogies*, i.e., pedagogy, andragogy, critical pedagogy, etc. In the USA, as much as around the globe, such adult education practitioners put many methods, strategies, and techniques into their toolboxes. Yet, when any one of these tools did not work, a next *tool du jour* is applied, all too often not with clarity about *why* and *how* to use the tool.

This spectrum of roles and practices is a way to review and examine the processes of design, development, and implementation of an Adult Education practice. As we jointly explore new frontiers of the Adult Education industry and seek to meet the needs of learners who seek non-traditional approaches, we ought to build on our practices and open our minds, hearts, and egos to acknowledge, examine, and embrace values, knowledge bases, methods, techniques, and learning goals and preferences which are different from our own. In the increasingly global knowledge society of the 21st Century we ought to adapt to lived interdependence in the teaching and learning process.

Hence, the Adaptive Leaders (AL) position in our spectrum depicts a form of educational partnership that is foundational to a metagogical paradigm for the education/education of adults. Ideally, the values underlying the described AL approach permeate throughout the varying approaches in the spectrum while methods and techniques are applied transparently to meet needs and the learning tasks at hand. Teachers leave the responsibility with the student for rejecting or accepting their knowledge and approach. They know their role is more than merely providing subject-matter content. Many times, they must provide knowledge and experience in other areas that support the use of the newly acquired knowledge. Such adapting teachers analyze situations, consider options and alternatives, make recommendations, and motivate students to action by providing value and resources. Successful adult educators in the Metagogy paradigm see the importance of the periodically, iteratively, and recurrently needed role of consultants. They understand that their success depends upon their ability to share their expertise in a responsible and accountable manner that contributes first to their students' success and second to their own growth. They also understand that they need to consult openly with students to determine the most appropriate approach to facilitate learning.

Such a partnership has both constantly looking for new ways to improve the educational experience. Teachers have now moved into the role of being transformational leaders in the relationship. At the same time, the desired partnership evolves when the commitment to the partner is focused on getting mutual needs met. Both ought to enjoy providing for, servicing, and contributing to one another's goal achievement and to personal and professional development. Partnership means being committed to something larger than the individual. These educational partnerships have a future beyond a single course or a one-time, educational event. They constitute a mutual commitment to one another as much as to the learning and teaching process. The student is asked to take a quantum leap and trust the teacher, and to trust the process. While they leap together, the roles of teacher and student become interchangeable. The partnership exists with shared goals, ethics, attitudes, and orientations. There is a common vision that connects teacher and student as both are engaged in transformation toward personhood. This interdependency creates moments of critical self-reflection for the teacher and student, but especially promotes growth and learning for the teacher. Being in partnership means a commitment to ongoing communication. Therefore, continuous growth is reinforced for both student and teacher within a metagogical approach.

It is, of course, easier written than acted upon to leave the ego at the classroom door, to critically reflect on designs, purpose, and curricula of education programs. It is even more difficult to do so within institutional constraints. We surmise not much about what we have written and cited here thus far provided mind-boggling insights for the readers. We wish to highlight that the essence of needs, values, and agency we identified and named with the Metagogy Project, i.e., our Metagogy Theorem as an education paradigm, calls for teacher and student to be radical in their examination and clarification of values, beliefs, assumptions, needs, and the teaching-learning process. Radical, in its Latin origins *rādīcālis*, means going to the root of things. Simply put then, it is important to identify whose reality prevails in institutionalized and non-formal education activities and ought to prevail; and toward what ends are we teaching and learning and ought to teach and learn. We are equipped to take on the challenge of leading forth other adults **when** we are willing and capable to examine our self with rigor, to inspire others to achieve their goals, and embrace our profession with passion and love for the learner.

Finally, we absolutely must know and accept what risk or ego deflating this stance may hold for the adult educator within our structures and institutions. We have much work to do. Therefore, we leave with the words of Jiddu Krihnamurti, "***There is no end to education. It is not that you read a book, pass an examination, and finish with education. The whole of life, from the moment you are born to the moment you die, is a process of learning.***" (1974, p. 49)

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