



## Purpose and Structure of the Course

Program planning is a pervasive process in adult education. If we regard education as the provision of systematic or organized learning experiences, then it can be argued that program planning is at the core of adult education practice. It is hard to imagine what the landscape of adult education would look like if practitioners were not engaged in program planning. A **program** is an arrangement of activities and experiences designed to promote adult learning, but a program is much more than instruction. Programs may be single events or an elaborate series of related events; they may last an hour or last for years; they may be highly structured or fluid; and may be institutionally-based or community-based.

Planning is a complex process that substantially influences and is influenced by the context in which it occurs. Planning is also a social process so it is influenced by the same social, cultural, political and economic factors that influence other human social endeavours. Planning is fundamentally about attempting to shape and control events in the future. We plan because we want to increase the chances that what we—and others—want to happen does happen. The degree to which this is *possible* and *desirable* is a debatable issue because control over the future is elusive. Of greater interest, however, are the ways of thinking about planning that have been developed and the degree to which these are useful for both understanding and engaging in planning.

Although it is possible to learn how to plan programs without a thorough understanding of the theoretical, conceptual, and philosophical perspectives which undergird practice, this course will emphasize the development of such understanding and the important relationship between theory and practice.

*The purpose of this course, then, is to provide an opportunity to study the process of program planning from theoretical, conceptual, and philosophical perspectives with the intent of promoting more informed, insightful and reflective practice.*

In order to accomplish this purpose, we will be exploring a variety of different ways of thinking about and engaging in planning. Students will be expected to read a wide range of source materials and to become familiar with several different approaches to planning in adult education. We will be exploring what might be called “orthodox” or “conventional” approaches to planning as well as the “unorthodox” and “unconventional.” Students are encouraged to explore and extend current critiques of planning models and frameworks so that we all can achieve a better understanding of

the strengths and limitations of the planning paradigms and processes found in adult education.

### **Course Content**

Following are some of the topics that are likely to be addressed in this course depending on the interests, background and expectations of students:

1. Preliminary considerations
  - The purpose and nature of planning
  - Control and power in planning
  - Technical, social-political and ethical domains of planning
2. Challenges to “conventional” planning
  - Feminism(s) challenge
  - Postmodernism(s) challenge
  - Critical theory challenge
  - Multi-cultural challenge
  - Other challenges
3. Milestones in theory and model development
  - Tyler (1949)
  - Knowles (1950, 1970, 1980)
  - Beal, Blount, Powers & Johnson (1966)
  - Freire (1970)
  - Houle (1972, 1996)
  - Green & Kreuter (1974...2005)
  - Goldstein & Ford (1974...2002)
  - Nadler & Nadler (1982, 1994)
  - Boone, Safrit & Jones (1985, 2002)
  - Caffarella (1988...2013)
  - Cervero & Wilson (1994, 2006)
  - Gboku & Lekoko (2007)
4. “Conventional” approaches to planning
  - Andragogical/participatory models
  - Decision points/sequential steps models
  - Systems approach models
  - “Interactive” models
  - Human resource development/training models
  - Epidemeological/health models

5. “Unconventional” approaches to planning
  - Freire’s liberatory literacy model
  - Cervero and Wilson’s negotiating power and interests framework
  - Sork’s question-based approach
  
6. Issues in planning theory and practice
  - The central importance of context in planning
  - “Needs,” “needs talk,” and “needs making” in adult education
  - Expressing intentions, and the problematics of outcomes-based education
  - Gender, culture, ableness and other forms of difference in planning
  - Power and control in negotiating the formation of programs
  - Innovation, creativity and technology in program planning and delivery
  - Marketing, finance and the commodification of knowledge
  - Learning about theory and practice from analyzing planning successes and failures

### **Learning Outcomes**

At the conclusion of the course, you should be able to:

1. Describe the historical evolution of planning theory and its current state of development within adult education in North America and elsewhere.
2. Identify the key theorists in program planning and the unique contributions made by each to our understanding of practice.
3. Explain the distinguishing characteristics of various “paradigms of planning,” their relative merits, and why there is continuing disenchantment with exclusively technical-rational perspectives.
4. Explain the assumptions, key concepts, dominant metaphors and social processes embedded in at least four planning “models” or “frameworks” and evaluate the strengths and weaknesses of each in relation to the purpose it was designed to achieve and the context for which it was designed.
5. Describe common social-political and ethical issues related to program planning and explain and justify how you would respond to each.
6. Articulate a way of thinking about program planning that is consistent with your personal philosophy, is compatible with the context in which you work—or hope to work—is adaptable to the variety of planning situations you are likely to face, and is defensible from a moral-ethical viewpoint.

## Course Format

This is primarily a face-to-face (f2f) course, but we will be using UBC's learning management system—Canvas—to access various print and other resources and for some class activities. If you have not already used Canvas, you can sign on using your Campus Wide Login (CWL) at **[canvas.ubc.ca](https://canvas.ubc.ca)**.

If you wish to learn more about Canvas, a useful website to visit that has links to multiple resources, including the Canvas FAQ, is: [Student's Guide to Canvas](#).

A very useful feature of Canvas is that it is *mobile friendly*. You can download the **Canvas Student** app to your smartphone and use your phone to access Canvas.

***I will also be asking you to submit all assignments through Canvas so if you haven't done this before, have a look around within the course, find the "Assignments" button, and learn how to upload your assignments.***

A variety of instructional processes will be used throughout the course. In addition to assigned readings, information will be presented via lectures, occasional handouts, PowerPoint and student presentations. Because most questions related to planning theory have no "right" or "wrong" answers, a good deal of time will be spent discussing alternative ways of understanding and analysing the planning process. Consistent emphasis will be given to the development of critical analysis skills through systematic reviews of relevant literature and through discussion.

Since this course emphasizes the exploration of conceptual, theoretical, and philosophical issues found in the literature, the instructional format will be as participatory as the class size, time constraints, and disposition of class participants will allow. This is *not* a "how-to-do-it" course, although the theories, models and frameworks we study are designed to have practical value. The course will emphasize questions and issues which are generalizable to many planning situations and contexts rather than focus on one or a few sites of practice. Students should therefore be prepared to engage in discussions of relatively abstract ideas rather than situation-specific problems.

## Readings

Many of the readings for the course will be available online but some materials will be found in various books and some may be provided in print if not otherwise available. There is no required textbook for the course. Some program planning books that may

be of general interest and will be used for inquiry group presentations (see below) will be put on reserve—accessible within Canvas or in the Education Library in Scarfe—or loaned out by the instructor.

A session-by-session schedule will be distributed at the first class session—and posted in Canvas—with a full list of required and recommended readings. As the specific interests of class members become known, this schedule may be revised and additional references added or distributed via Canvas.

Each student will also be expected to search for and read additional materials related to their individual assignments and inquiry team presentation.

Please note that all students will be expected to read “required readings” prior to each class session where they will be discussed. In addition, you will be expected to come to class with:

- A brief written “take-away” point or observation for each reading
- One or more critical questions about each reading that you would pose to the author(s) if they were available to discuss their work.

## Assignments and Expectations

There is no pre-requisite for this course although it is a graduate-level course with relatively heavy reading and writing requirements.

### • General Information

Every student in EDST 514 will be writing *analytical essays* and/or *papers* and will be a member of an *inquiry group*. You will be able to choose whether you wish to write two short *analytical essays* or a longer *analytical paper*, but everyone will write a *reflective essay* and be a member of an *inquiry group*. With the exception of the reflective essay which will be worth 20%, you will get to decide how much weight you wish to place on the other course requirements (within a specified range). See the *Course Requirement Weighting Agreement* below for more details.

This explanation of course assignments is designed to provide useful information on my expectations for written work and for the inquiry group presentations.

Several expectations apply to all written assignments:

1. Written assignments should be typed, double-spaced (no cheating!), and carefully proofread. Please use 12-point type.
2. Please use one inch margins on all sides and number the pages consecutively beginning with the first page of text (do not number the cover/title page).
3. All written work should have a clear statement of purpose at the beginning and a summary or other form of concluding section at the end.
4. All sources of information used in assignments should be carefully documented in a bibliography or reference list. It is highly recommended that you become familiar with the primary style manual used in adult education. It is:

American Psychological Association. (2009). *Publication manual of the American Psychological Association* (6<sup>th</sup> Ed.). Washington, DC: Author.

[You may also use the shorter but still useful *Concise Rules of APA Style* (2005), also published by the American Psychological Association, or various APA style guides found on the web.]

My main concerns are accuracy and consistency, so if you are familiar with another style manual, feel free to use it rather than APA...just don't make up your own style!

You must identify all text that is not your own using quotation marks, single-spaced indented text and other conventions that are explained in style manuals. It is extremely important that you follow these conventions so I can clearly distinguish your writing from the writing of others whose ideas you might wish to summarize in your essays/paper. It is fine to directly quote (sparingly) other sources and to paraphrase the work of others as long as you indicate you are doing so using standard conventions including identifying the complete reference (including page number where the quotation is found) of the borrowed material. But you must avoid giving me the impression that you have written material that was actually written by someone else.

5. All analytical essays/papers should reflect your ability to analyze, critically assess and form reasoned judgments about ideas found in the literature of program planning. That is, each assignment should go beyond simply reporting what various authors have to say about a particular concept, controversy, issue, or question related to program planning. Analytical essays and papers should reflect your ability to identify common and disparate elements in various viewpoints (comparison and contrast), to create a new perspective from elements found in competing views (synthesis), and to judge the quality (strengths and

weaknesses) of a perspective based on the argument and/or evidence presented to support it (evaluation).

- **Reflective Essays**

The first assignment is a *reflective* essay in which you present your personal views, experiences, preferences and theories about program planning. The purpose of this essay is to prompt you to reflect deeply about your own background, the experiences you have had with various types of planning (not just educational), what you have learned about planning from these experiences, what your beliefs are about planning, and your own preferences and propensities about planning. In this essay it is fine to describe your own good and bad experiences with planning and what you learned from each, your views about some of the early readings you have done in the course and how these relate to your experience, what you think you need to learn more about to improve your abilities as a planner, and so on. *Please note that the above list is only of possible things to include...you are not expected to address all of these in the six pages available. Select those that seem most relevant to you.* This essay will be evaluated based on the depth of your reflections, how well you organize and present your story and how insightful your observations are about your own experience, your own skills as a planner, your confidence in or scepticism of the literature (or planning in general), and what you need to do to become a more capable planner.

Reflective essays should be 6-7 double-spaced, typewritten pages of 12 point Ariel (or similar) type (not counting the title page) plus any references or bibliography. Please set margins on all sides to 1 inch. The due date for the reflective essay will be indicated in the course schedule.

- **Analytical Essays**

The *analytical* essay is a relatively brief, tightly organized, and highly focused piece of writing designed to (1) reveal your understanding of the perspectives or issues under discussion, (2) identify and analyze important concepts, assumptions or principles contained in the works, (3) identify strengths and weaknesses of various perspectives, competing ideas, or arguments, and (4) report any noteworthy insights gained or things learned from doing the analysis.

Topics selected for the essays should be amenable to a brief treatment and should have a sufficient literature base available. If you are comparing and contrasting perspectives of different authors, include at least two, but preferably three, *somewhat different* perspectives. It is possible to write essays using only the perspectives found in the books and other materials referred to specifically in the course, but it may be



desirable to use other literature to address the topic of an essay in a substantive way, so feel free to use any relevant literature you can find.

Evaluation of analytical essays will be based on organization and clarity of writing, accuracy and depth of analysis, cogency of arguments presented, and how well the essay accomplishes its stated purpose. An assignment deserving an A+ (90, 95 or 100%), A (85%) or A- (80%) is one that has a clearly stated purpose, accurately presents the essence of the perspectives or issues, critically examines the perspectives or issues, and is brought to a graceful conclusion. The essay should be well-organized, clearly written, grammatically correct, and should reflect what you have learned as a result of reading, reflecting upon, and writing about the literature included in the analysis. All written work should use gender-inclusive language and should avoid language that can be construed as biased or demeaning. Essays which meet most but not all of these criteria will receive a B (75%) or B- (70%). Essays that fail to meet a majority of the criteria, but which represent an earnest effort to address the issue, will receive a C+ (65%) or C (60%). Any mark lower than 60% is considered an “F” in the eyes of the Faculty of Graduate and Postdoctoral Studies and will appear as such on the transcript. I will assign a percentage mark—in 5% increments—on all individual assignments. If I assign a grade of less than 80%, I will try to explain as well as I can what could have been done to produce a “first class” piece of work. For assignments that receive 80% or above, I will, in most cases, describe what made the assignment a “first class” piece of work. It is more difficult to be specific about what might have moved an assignment from an 80 to an 85 or from an 85 to a 90, but I will do my best to give you suggestions about how to improve your work. See the *Grading Rubric* below for more information.

Analytical essays should be 6-7 double-spaced, typewritten pages of 12-point Arial (or similar) type (not counting the title page) plus references or bibliography. Please set margins on all sides to 1 inch and number the pages beginning with the first page of text (not the title page). Due dates for essays will be indicated in the course schedule.

- **Analytical Papers**

The analytical paper is an in-depth exploration of the theoretical, conceptual, and/or philosophical aspects of a task, issue, debate or question related to program planning. The task, issue, debate or question that you choose to write about can be from any of the material covered in the course readings or other readings *as long as it is clearly related to program planning*.

Analytical papers should demonstrate your command of the literature on the topic you choose and your ability to analyze, critically assess and form judgments about various

perspectives on the topic. **Like analytical essays, papers should go beyond simply reporting what various authors have to say about some aspect of program planning.** You should attempt to compare and contrast various perspectives and to pass judgment on the theoretical and/or practical utility of the different views presented.

Analytical papers should be between 15-20 double-spaced, typewritten pages of 12 point Ariel (or similar) type (not counting the title page) plus references or bibliography. Please set the margins on all sides to 1 inch and number the pages beginning with the first page of text (not the title page). The final due date for papers will be indicated in the course schedule, but you can certainly submit your paper earlier. If you wish to discuss potential topics with me prior to making a final selection, I'll be happy to talk with you. This is especially important if you are unsure whether or not the topic meets the criterion of *being clearly related to program planning*.

Evaluation of analytical papers will be based on clarity, internal consistency of the analysis and judgments, the treatment given to available literature, how well you support your conclusions, the degree to which you explore alternative perspectives, and the level of initiative you take in seeking out literature beyond that discussed in class and in the course reference books. Do not overlook assumptions or contextual factors, whether explicit or implicit, which underlie an author's position. And don't be timid about criticizing a source for sloppy, imprecise, or confusing utterances. I've written quite a bit about planning myself and I expect you to apply the same critical standards to my work as you do the work of others. Believe me when I say that I'm not impressed by uncritical praise of my work. Improvement of academic work depends on critical analysis.

Marking of analytical papers will be based on the same criteria as essays but with the added expectation that the literature sources will be more extensive and the analysis will be in greater depth.

If you have any questions about the nature of the written assignments, the criteria employed in evaluating assignments, or wish to receive clarification of the reasons for the marks you receive on assignments, please arrange an appointment with me.

- **Inquiry Groups**

The inquiry groups are designed to provide an opportunity for students to enhance their understanding of program planning by collectively analyzing and making a presentation on one particular planning model or framework.

There will be a place to sign up for the inquiry groups in Canvas (click the "People" tab). The first job of the group will be to decide which members will be responsible for which

parts of the analysis/critique. Each group will be responsible for presenting and leading a discussion on one planning model.

Each group will have about 60 minutes during one of the class sessions in Week 6 of the term to make its presentation and conduct a discussion. One member of the group should be responsible for monitoring the time and keeping the discussion on track. The objective of the presentation and discussion is to help all class members develop a deeper understanding of various approaches to planning found in the literature—especially to get beyond the surface characteristics of the models to reveal underlying assumptions about the purposes of adult education, the nature of educational planning, power and participation in planning, and other substantive matters. Make the session as participatory and stimulating as possible, but remember that the intent of the presentation and discussion is to enhance our understanding of planning theory. A group mark will be assigned based on the overall quality of the presentation including how well the presentation reflects:

- ✓ Substantive knowledge of the model(s) being discussed
- ✓ Critical analysis (going beyond simple “reporting” on the model)
- ✓ Organization—planning, timing and quality of delivery
- ✓ Use of visual and other aids
- ✓ Provision of a handout
- ✓ Adequate time for questions and comments

### • **Selecting Topics for Analytical Essays and Papers**

Program planning is a very broad area of adult education with a large and widely-dispersed literature base. The books that have been placed on reserve in the Education Library are good examples of “program planning literature” in which competing ideas and perspectives can be found. Selecting suitable topics for essays and papers is sometimes a daunting task because you have a limited amount of space in which to analyze what are often complex issues. It is also possible to select what seems to be a very promising topic and to later find little or no literature available to analyze.

Because topic selection is always a concern, here is the best advice I can offer based on past experience.

1. Remember that the focus of the course is adult education program planning theory. The raw material for analytical essays and papers is literature that directly addresses program planning in whole or in part. This includes literature that presents models or frameworks for thinking about and doing planning, research studies which explore questions with direct bearing on program planning, critiques

of planning or planning concepts, and other literature that has direct implications for how we think about and engage in program planning.

2. The best essays and papers are written on topics that have been selected after students do some serious reading in the literature. While doing this reading, students often encounter a provocative or interesting idea or perspective that they wish to learn more about. In other cases this reading raises a question in the student's mind about planning that he or she wishes to explore.
3. Keep in mind that analytical essays and papers will involve exploring *more than one* point of view or perspective so topics should lend themselves to such an analysis.
4. If you are interested in exploring the procedures or technology of planning— involving people, doing needs assessments, developing objectives, planning instruction, marketing programs, budgeting and pricing programs, evaluating programs, and so on—there are plenty of books that offer descriptions of how to approach these tasks.

If you are interested in exploring the meanings of key concepts used in planning— like participation, need, objective, evaluation, and so on—there are also adequate source materials, but you will have to go beyond those that are on reserve.

If you are interested in exploring underlying assumptions, metaphors for planning, or issues such as the role of gender, cultural differences, power, etc. in planning, there are also adequate source materials, but they are a bit more difficult to find. See me for advice.

You may use any literature that has a direct bearing on program planning *so you are not limited to those materials that are on reserve*. The materials on reserve are there because they represent different perspectives on planning and different contexts in which planning occurs, but there are dozens of books on program planning and hundreds of articles and chapters with direct bearing on program planning that can be used as raw material for essays and papers.

5. Feel free to use what you learn as a member of the inquiry group in your essays or paper. It is quite acceptable to incorporate into your essays or paper material that you present to the class.

6. Pick topics because they interest you rather than because you think they will interest me.
7. Avoid picking essay topics that are too broad or overly vague. Topics like “Needs Assessment Approaches in Program Planning” are far too broad even for a paper, but if you narrowed it to something like, “The Role of Needs Assessment in the Planning Models of Knowles, Houle and Cervero/Wilson” it would be quite suitable as an essay topic. Topics like “The Concept of Participation in Planning” are somewhat vague and again are too broad to be covered in an essay, but a topic like “The Meaning of Participation in Planning in the Models of Boyle, Beal et. al. and Freire” would be fine. “Metaphors of Planning” is too broad but “Comparing the Planning Metaphors of Boone et al and Cervero/Wilson” would be fine.
8. Avoid picking essay topics that require analysis of more than three perspectives because it is simply impossible to do this well in six pages.
9. Pick a *paper* topic that is substantial enough to discuss for 15-20 pages. This is enough space to get into detailed analysis and critique and it’s expected that you will do so. On the other hand, there are some topics that are “too big” for even a paper, so pick something that can be adequately dealt with in the space available. It is much preferred to do an in-depth analysis of a few carefully selected sources than it is to do a superficial analysis of more sources.

- **Grading Rubric**

Evaluative criteria for these assignments include:

- demonstration of adequate preparation, with all requirements met;
- accuracy of understanding and analysis of content;
- insight and appropriateness of application to practice;
- attention to detail, organization and preparation;
- sources and quotes must be properly cited in all written work, and a reference list included at the end when relevant (see <http://help.library.ubc.ca/evaluating-and-citing-sources/how-to-cite/> for details on citing correctly, or contact me immediately if you are unfamiliar with this).

**“A” level work (80-100%)**

This category is for strong work that has, at most, only minor shortcomings.

“A+” is from 90-100%. It is reserved for assignments that are exceptional and greatly exceed course expectations. In addition, the work must satisfy all the conditions below.

“A” is from 85-89%. A mark of this caliber indicates a very high level of quality in all aspects of your assignment. Work deserving of an A is distinguished in virtually every

aspect. It shows the individual (or group) has gone well beyond what was provided and has demonstrated thorough analysis and accurate understanding of materials.

“A-” is from 80-84%. It is awarded when the quality of work is high, but slightly uneven. For example, A- work may be of high quality on all but one criterion. There should be no problems or errors of significance.

### **“B” level work (68-79%)**

This category of work is typified by adequate performance on most criteria. The distinction between levels is a matter of degree.

“B+” (76-79%) will be awarded if the assignment is generally adequate in most regards, but not exceptional in any category.

“B” (72-75%) will be assigned if the assignment has one or two significant problems, e.g., (1) superficial understanding, (2) errors in understanding, (3) lack of demonstrated initiative, (4) lack of clarity in argumentation, or (5) multiple problems with attention to details.

“B-” (68-71%) will be awarded if the assignment has three or more significant problems (as per B above).

### **“C/C+” level work (60-67%)**

A mark below 68% will be assigned to work that is more seriously flawed, e.g., serious lack of attention to requirements or consistent significant problems across criteria.

NB: If you receive a grade below 60% you can negotiate with me for one opportunity to redo any written assignments that might contribute to an improved grade.

## **Maintaining a Respectful Teaching/Learning Environment**

All members of the UBC community are entitled to a respectful environment and we all have a role to play in maintaining such an environment. If you experience communications or interactions you feel are harmful to or inconsistent with a respectful environment, let me know. Please read the [UBC Statement on Respectful Environment](#) for more information, or read the [FAQs for Students](#).

## **Fostering an Inviting and Inclusive Academic Climate**

The Department of Educational Studies has approved a set of principles that we believe should guide our activities as teachers, advisors and scholars. This document—[Fostering an Inviting and Inclusive Academic Climate](#)—can be found on the department’s website:

This statement of principles addresses such issues as sexual harassment, conflict of interest, inclusiveness and other matters of concern throughout society. These principles are meant to govern the interactions between and among faculty, students and staff. If you believe that any of these principles is being violated in activities related to this course, please call it to my attention personally, in class or anonymously. My goal is to make this course a positive but challenging learning experience for all who enrol. My intention is to behave consistently with the principles we have approved and I invite your observations and comments on how well I am doing.

### **Disability and Accommodation**

If you have an impairment that requires accommodation in this course, please speak to me or provide me with documentation and recommendations from the [UBC-V Access & Diversity](#) office.

### **Statement on Academic Honesty**

“The integrity of academic work depends on the honesty of all those who work in this environment and the observance of accepted conventions such as acknowledging the work of others through careful citation of all sources used in your work. Plagiarism - including self-plagiarism - and other forms of academic misconduct are treated as serious offences at UBC, whether committed by faculty, staff or students. You should be aware of the sections of the University Calendar that address [Academic Honesty](#) and [Academic Misconduct](#).

The UBC Learning Commons also has useful information that explains what plagiarism is and [how to avoid it](#). If you have questions or concerns about any of these policies or conventions in relation to how they apply to the work you do in this course, please discuss them with your instructor.”

EDST 514—Adult Education Program Planning Theory  
Summer Session, 2018  
Term 1

**Course Requirement Weighting Agreement**

Name \_\_\_\_\_ Student No. \_\_\_\_\_

Date \_\_\_\_\_

**Instructions:** This agreement is designed to provide you with an opportunity to select the relative weight out of 100 points that each course requirement (written work, inquiry team presentation and your participation) will carry in the final grade (within the limits provided). The numbers in parentheses following each requirement are the weightings that each can carry in the final assessment. The weightings are re-negotiable up until each assignment is submitted. Please be sure that the weights for all course requirements sum to 100.

Please download this form from Canvas and submit it in Canvas by the due date for the *Reflective essay*.

<b>→ Essay+Paper Option</b>	<b>Weighting in %</b>
Reflective essay	20
Analytical paper (45, 50, 55 or 60)	_____
Inquiry group presentation (10, 15 or 20)	_____
Participation (0, 5, 10, or 15)	_____
<b>Total</b>	<b>100</b>

<b>→ Three-Essay Option</b>	
Reflective essay	20
Analytical essay #1 (25, 30 or 35)	_____
Analytical essay #2 (25, 30 or 35)	_____
Inquiry group presentation (10, 15 or 20)	_____
Participation (0, 5, 10, or 15)	_____
<b>Total</b>	<b>100</b>