

CHALKLE: THE CASE STUDY OF AN EDTECH SOCIAL ENTERPRISE  
ASPIRING TO TRANSFORM ADULT AND COMMUNITY EDUCATION IN  
AOTEAROA, NEW ZEALAND

BY

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# Abstract

This thesis examines *Chalkle*, an edtech social enterprise, through an exploratory case study which offers an in-depth analysis of its operations, policies, procedures, and practices in the period between July 2012 and December 2015. The study of *Chalkle* explores the company's aspirations to transform the field of Adult and Community Education (ACE) in Aotearoa, New Zealand. This thesis examines the motivations, challenges, and opportunities presented by *Chalkle* from the perspective of various stakeholders: learners, teachers, providers, *Champions*, as well as the organisation's co-founders. The study of *Chalkle* offers insights into an alternative model of ACE, which harnessed the power of a technology platform and utilised a social enterprise business model to encourage greater connectivity within the ACE sector. An analysis of *Chalkle* is important in order to explore and understand how collaboration across and beyond the ACE sector, in this case through a mix of education, technology, and business, could offer insights into sustainable solutions to withstand changes in government policy and funding.



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# Chapter 1: Introduction

*Far too many people are leaving the high school and university systems, both as learners and teachers, disillusioned, disconnected and worst of all, in their minds 'done' with learning. Core to our motivations as founders to work in the space where technology, business and education come together, is to confront this challenge. From where we are standing our greatest (and most important) input will be to contribute to building culture around teaching and learning. Learning is an innate part of our humanity, we are collectively bound by our limitations around what we can learn and teach each other. This grand process does not end when you get your certificate or your student card expires.*

(Cabraal, 2014)

## Introducing *Chalkle*

This thesis is focused on a case study of *Chalkle*, a community education organisation. *Chalkle*, founded in Wellington in 2012, was at the time of this study, identifying itself as an educational technology (edtech) social enterprise. The founders envisaged an edtech startup with a social mission, operating across Aotearoa, New Zealand, which would employ commercial methods and harness the powers of online technologies to enable people who wanted to teach to connect, both online and face-to-face, with people in their community who wanted to learn. The quote above from Anthony Cabraal, one of *Chalkle's* co-founders, introduces the concepts at the core of the social mission the founders had for the organisation: to address challenges identified in the culture around learning and teaching; to recognise the importance of education (and teaching and learning) to 'our' collective 'humanity'; and to use the combined forces of technology, business, and education to encourage more people to connect in order to teach and learn from each other. *Chalkle's* aspirations for the adult and community education (ACE) sector, in addition to its emerging, fluid, and hybrid form as an ACE sector in Aotearoa, New Zealand, are what inspired me to explore the organisation through an exploratory case study as the topic for this thesis.

From its inception, *Chalkle* cultivated a web-based presence and connections with diverse community organisations. *Chalkle* was launched as one of the ventures of the Enspiral Network ([www.enspiral.com](http://www.enspiral.com)), a virtual and physical network of companies and individuals based in Wellington working collaboratively in the social enterprise space. At the time I met with the co-founders to discuss this research project in 2013, *Chalkle* was connecting with and sparking interest from the ACE sector including from the national umbrella organisation, ACE Aotearoa. ACE Aotearoa reported on *Chalkle* in their Adult and Community Education Newsletters (i.e., ACE Aotearoa, 2012/Spring, 2013/Winter, 2014/Spring, 2015/Winter). *Chalkle* received the *Dynamic Community Learning Award* at the launch of Adult Learners week in September 2012, only two months after being launched. Organisations that have received the award in other years include Waiheke Adult Literacy, the Somali Homework Centre, and the Menzshed; being recognised with this award suggests that *Chalkle* had made its presence and its promise felt in a very short space of time ([www.aceaotearoa.org.nz](http://www.aceaotearoa.org.nz)). The organisation and its co-founders were also generating interest and receiving recognition outside of the ACE sector, including from business and community development organisations. For instance, the co-founders received an *Absolutely Positive Wellingtonian Award* in 2013, and *Chalkle* was featured in a number of media including on Radio New Zealand and in The Dominion Post. These connections with diverse organisations will be discussed in detail in the Findings (chapters 4 and 5).

**Adult and Community Education in Aotearoa, New Zealand.** *Chalkle* self-positioned in the ACE sector, which encompasses organisations offering a diverse range of educational activities from those organised in formal contexts (e.g., continuing education offered through universities), to non-formal and informal activities offered through community groups, workplaces, churches, and libraries (e.g., interest-based classes) (Benseman, Findsen, & Scott, 1996; Bowl, 2011, 2014; Tobias, 1996, 2016). Adult and community education in Aotearoa, New Zealand reflects the

country's bicultural heritage: many of the educational institutions still in operation were developed from a British model, however the influence of Māori worldview and values about education and community continue to play a significant role in defining the ACE sector (and its policies) today (Bowl, 2014; Hindmarsh, 1996; Leach, 2014). The ACE sector also reflects the country's relatively small population, increasingly diverse in terms of its ethnic makeup, and largely located within six major urban centres. Factors such as a small concentrated population, combined with what some would refer to as 'settlers' ingenuity' (Bridgman, 2007; Jesson, 1997), as well as the ever-present struggles of Māori to contest hegemonic educational ideas and structures (Walker, 1990), may all have contributed to maintaining a space for education with social and cultural aims in Aotearoa, New Zealand (Bowl, 2014), as well as enabling the flourishing of social networks (Bowl & Tobias, 2012).

The ACE sector encompasses many organisations and different forms of delivery, most of which are beyond the parameters of this thesis to discuss. Suffice to say, these include adult literacy and numeracy (the government's priority for ACE), refugee and migrant programmes, English language provision, as well as iwi-based courses and programmes, Workers Educational Associations (WEAs), Rural Education Activities Programmes (REAPs), and many others. *Chalkle* offered a hybrid of non-formal community-based educational initiatives and informal learning opportunities: although it used technology and online systems to establish connections between its users, *Chalkle's* goal was to supplement (rather than replace) and strengthen the *offline* community of local teachers and learners by making it easy for anyone to teach or take a class (Anderson, 2013). The quote below from one of the co-founders expresses *Chalkle's* intention to create community-led educational opportunities facilitated through technology tools and support:

We know people love to connect with each other and learn in different ways and different formats. We are exploring how software and support can facilitate putting the power of this choice and wider potential directly into the hands of the teaching and learning community. (Cabraal, 2014)

**ACE literature and the neoliberal context.** While literature on adult and community education policy in Aotearoa, New Zealand is readily available (see Benseman, Findsen, & Scott, 1996; Bowl, 2011, 2014; Bowl & Tobias, 2012; Leach, 2014; Tobias, 1996, 2004, 2016; Zepke, 2009, 2015), the field generally remains under-theorised and under-researched compared with other fields of education (Torres & Mayo, 2013). Research in the ACE sector has been undermined by a number of factors including very little funding and lack of government support, as well as an overwhelming focus in the literature on practice, to the detriment of more theoretical analyses (Bowl, 2014; Torres & Mayo, 2013). This thesis draws primarily on literature in relation to ACE policy and practice, recognising the importance of historical-social-cultural-political perspectives when examining adult and community education. It also draws on literature related to social enterprises and educational technology, exploring their links with the ACE sector.

This thesis is set in the context of current dominating neoliberal ideals and policies, which began in the late 1980s under a Labour Government (Bowl, 2014; Leach, 2014). The rise of neoliberalism in Aotearoa, New Zealand is referred to as the 'New Zealand Experiment' (Kelsey, 2015), which involved a roll-back or removal of government services and support in favour of the market-based, competitive and profit-orientated provisioning of similar services and the consequent promotion of self-government in which the responsibility for education as well as welfare, health, employment, and other services, was increasingly placed on individual citizens (and community organisation). The social enterprise business model for ACE within this context would aspire to be one of the solutions to community education provision, responding to cutbacks in government funding while aiming to preserve the social justice quotient of community education; however, this model is not without its limitations and critics, which will be explored in later chapters.

User-pays and volunteer models dominate adult and community education, in Aotearoa, New Zealand as well as on a global scale (Bowl, 2014; Bowl & Tobias, 2012). This has had a significant impact on *how* and *which*

courses are delivered. Although there was a brief period of policy support for ACE between 1999 and 2008 under a Labour-led coalition government, this short-lived endorsement was accompanied by more competitive approaches and tighter accountability regimes, as well as an overall emphasis on education as instrumental to meeting the needs of the knowledge economy (Leach, 2014). In 2008, one of the incoming National government's first acts was to reduce the budget for ACE in the name of economic stringency (Bowl, 2014; Leach, 2014; Tobias, 2016); particularly hit hard were school-based ACE providers who delivered courses and were often involved in the allocation of funds to small, local ACE organisations. In terms of specific numbers, the budget was reduced from \$16 million to \$3.2 million (about 80% of the subsidy to school-based ACE) which in turn caused enrolments to drop dramatically nationwide, from about 225,000 in 2009 to 35,000 in 2012 (Gulliver, 2013; Tobias, 2016). The cuts meant drastic changes in the offering of state-funded ACE, withdrawing funding from courses not teaching literacy, numeracy or foundation skills, with policy-makers arguing that it was not justifiable to use public money to fund classes which did not deliver economic benefits (Harris, 2010). These cuts were in spite of evidence showing that the ACE sector was making important contributions to the community both socially and economically: "with a return of \$54–\$72 for each dollar spent and a national economic benefit of between \$4.8 billion and \$6.2 billion" (Pricewaterhouse Coopers, 2008, as cited in Leach, 2014, p. 714).

Somewhat paradoxically, the ACE sector struggles for government recognition and funding at a time when lifelong learning seems to be a focus of global educational policy (Bowl, 2014). ACE is subject to tertiary education policy (in Aotearoa, New Zealand), and changes in policy directly impact the sector. Lifelong learning is not as delimited and can be perceived as having a more ambiguous nature: it is both individual and institutional, policy and practice, a commodity and a social movement (Jarvis, 2009). However, neoliberalism's influence on educational policy has involved a narrowing view of lifelong learning from a vehicle for personal and social development, to a 'learning for earning' philosophy (Biesta, 2005), lending itself as a tool for

economic development and global competitiveness, and where knowledge and skills are viewed as commodities (Leach, 2014; Zepke, 2009, 2015). Adult and community education has been absorbed in this trend, both universally as well as in Aotearoa, New Zealand; one of the indications of this is the sector's increasing dependency on 'user-pays' as opposed to government funding. Another example of this on an international scale is the National Institute of Adult and Continuing Education (NIACE), in the United Kingdom, once the largest adult and community education organisation in the world, being subsumed in the Learning and Work Institute after funding cuts and mergers ([www.learningandwork.org.uk](http://www.learningandwork.org.uk)).

## Research Objectives

When I first came across *Chalkle*, I was intrigued by the fact that it occupied a space at the intersection of adult and community education, social enterprises (business), and education technology. This thesis offers a rich analysis of *Chalkle*, and insights into its hybrid, fluid, and emerging nature, examining its past operations, policies, procedures, and practices. I explore this through a detailed case study of *Chalkle*, charting its varying iterations over a two-year research period, from July 2012 (when the organisation was launched) to December 2015 (when the data collection for this research project ended), in a context in which the survival of much of the ACE sector was threatened.

Equally relevant to the study of *Chalkle* is gaining an understanding of the various perspectives and motivations of people involved in the ACE sector and who engaged with the organisation. I also therefore discuss the co-founders aspirations, as well as the challenges and opportunities for *Chalkle* in relation to the wider context of the ACE sector in Aotearoa, New Zealand. These opportunities include greater connection through the (increasingly popular) use of online technologies, as well as providing a collaborative model for ACE which reaches across and beyond education. Challenges include not only the funding problems discussed above, but also issues such as low-tech adoption within the ACE sector, and promotion and connection to a wider



community of learners (beyond those already engaged with online ACE networks).

Finally, I investigate *Chalkle*'s potential to be a solution to the ACE sector funding cuts. By harnessing the connective powers of online technology and utilising a social enterprise business model, I explore whether, and how, *Chalkle* provides an alternative (non-state funded) model of ACE in response to the challenges identified in the literature and in the social, political and cultural context of Aotearoa, New Zealand.

## **Organisation of this Thesis**

In terms of the organisation of this thesis, the next chapter includes a review of the literature canvassing the fields of adult and community education, social enterprises, and educational technology; this will be followed by the methods chapter. An in-depth description of the *Chalkle* organisation is included in Chapter 4: Findings - Context. As to be expected with new organisations or 'startups', as *Chalkle* described itself, the organisation underwent a series of transformations during the course of this case study; these changes are outlined in the 'Biography of *Chalkle*' section in Chapter 4. The context of this study is followed by Chapter 5: Findings – Key Themes, which includes results and a brief discussion of key themes which emerged from the individual interviews. These themes are related to the participants' aspirations for *Chalkle* and the ACE sector, motivations for engaging with community education and with *Chalkle*, as well as challenges and opportunities for the ACE sector and for *Chalkle*. A comprehensive discussion of the findings is featured in Chapter 6 and includes a general conclusion to this thesis.



## Chapter 2: A review of ACE, Social Enterprise, and Educational Technology Literatures

This research project, the case study of *Chalkle*, is located within the field of adult and community education (ACE), which in Aotearoa New Zealand is positioned within the tertiary (post-compulsory) education sector (Leach, 2014). The nature of the *Chalkle* organisation, however, is a hybrid of an ACE organisation as well as a business with a social mission ('social enterprise') which uses a technology platform as its infrastructure ('edtech'). Therefore, this research project draws on literature on adult and community education as well as on social enterprises and educational technology, all three of which are emerging, practice-based fields that tend to focus on policy, are under-theorised and have limited empirical research to date.

I use both the terms 'learning' and 'education' throughout this chapter depending on their use in the literature I am referencing. Both terms are often used interchangeably in the literature; however, there have also been what appears to be deliberate shifts between the use of 'education' and 'learning', like within the 'lifelong learning' discourse, as I will discuss below (Torres & Mayo, 2013). In most cases, I will use 'education' as this thesis focuses on the processes involved in adult and community education. I will use 'learning' when referring to informal learning (self-directed learning) as well as when discussing the concept of lifelong learning.

The chapter is divided into three sections. The first section discusses characteristics of the adult and community education sector which frame the context of this case study, and offers definitions of ACE used in educational policy in Aotearoa New Zealand. I explore the philosophical positions which frame the view of learners, learning, and educators within the ACE field (liberalism, behaviourism, pragmatism/progressivism, humanism, and radicalism), and discuss the learning spaces in which ACE activities can occur (formal, non-formal, and informal). I also explore the concept of lifelong

learning through various philosophical lenses. I then discuss one of the key characteristics of this sector, its political nature, analysing the neoliberalist policy framework shaping the current view of ACE both on a global scale as well as in Aotearoa New Zealand. The second section explores the emerging fields of enquiry related to social enterprises and educational technology, and their links to the adult and community education sector. The final section outlines empirical research in the fields of adult and community education, social enterprises, and edtech. I end this chapter by discussing how my research can serve as a contribution to the empirical literature in all three fields.

## **Adult and Community Education: An Overview**

Mapping the vast field of adult and community education can be challenging. It has been referred to as a kaleidoscope (Hindmarsh, 1996), characterised by diversity and fluidity in terms of its activities, its contexts, as well as its provider organisations (Bowl, 2011, 2014; Tobias, 1996). This diversity has made it difficult to reach consensus on what exactly constitutes adult and community education; additional complexity stems from definitions being contextual (Hindmarsh, 1992) and shaped by the historical context as well as the political and social purposes they serve (Tobias, 1992, 1996). I will use a definition from educational policy in Aotearoa New Zealand in order to frame this case study, and refer to the one offered in the *Briefing to the Incoming Minister* drafted by the Tertiary Education Commission (2008) which describes ACE as: “non-formal, non-assessed learning for adults. Its focus is often on personal development, skill enhancement or social/community objectives ... enables adults to engage in a range of educational activities within their community in a wide range of contexts, promoting a culture of lifelong learning” (cited in Leach, 2014, p.709). This definition indicates a non-formal context for adult and community education, and emphasises a culture of lifelong learning and personal as well as social development. The political nature of ACE will be discussed in later sections.

When compared to other sectors of education, the history of ACE places the sector at the margins of tertiary (post-school) education (Leach, 2014), yet it has also at times benefitted from support from more ‘mainstream’ cousin institutions such as universities, polytechnics, schools, and community colleges, through continuing education programmes, for example (Tobias, 2016). Authors have identified how, by being at the margins, ACE can be more flexible in its administration and programming compared to formal education (Merriam, Caffarella, & Baumgartner, 2012), and therefore may have quicker response times in developing programmes which serve the needs of its community (Tobias, 2016). ACE is also described as having great capacity for innovation, with programmes and practitioners being at the “forefront of new ideas and social changes” (Tobias, 2016, p.78). In Aotearoa New Zealand, Tobias suggests that innovation has lead the sector, even in times of financial constraints and limited resources. Tobias provides examples from the 1970s of various initiatives organised through Workers’ Educational Associations (WEAs). Such innovation may also be seen as, more recently, through *Chalkle* and its collaboration with partner organisations in Nelson (ACE Aotearoa, 2014/Spring).

In the policy and wider literature, ACE is often conceptualised in terms of community involvement. For instance, the Adult Education and Community Learning Working Party in their report (2001) argued that through ACE, adults may choose to engage in a range of education activities within the community that contribute to development: “it provides individual and group learning and promotes whānau empowerment, equity, active citizenship, critical and social awareness and sustainable development” (p.8). Other authors have conceptualised ACE as a *process*: educational activities grounded in everyday life and built on reflection and dialogue, designed to address the needs and common causes in the community (Field, 2009).

Perhaps the most prevalent feature of the adult and community education sector is that it is considered the ‘poor cousin’ of formal education (Newman, 1979; Tobias, 2016) as it is generally neglected by policy-makers, under-funded and under-resourced. One of the policy papers from the ACE

Sector Strategic Alliance (2014) responding to the 2009-2010 funding cuts to the ACE sector stated that:

Since 2009, government funding to the ACE Sector (part of the Tertiary Sector) has been reduced in order to achieve savings. Figures collected from across the ACE Sector over the past three years show a corresponding decline in government funded ACE programmes and learners nationwide. In contrast demand for non-government funded ACE is increasing. ACE providers and communities however struggle to meet demand where local resources are depleted. (Cited in Tobias, 2016, p.74).

The lack of funding for ACE leads to the sector being largely dependent on the work of volunteers, and the typically voluntary or casual nature of the ACE educator role leads to high staff turnover in community-based programmes. Weak or no common institutional ties and precarious working conditions can also lead to a lack of a political voice for ACE educators as a professional group (Bowl, 2011, 2014; Tobias, 2016). Finally, the lack of sustainable funding streams also impact the scarcity of research on the sector (Torres & Mayo, 2013).

Certainly, one of the emerging themes from the literature is that adult and community education can be conceptualised as a vehicle to fulfil multiple purposes in society, all of which have their own value for individuals and for groups: political, community and educational outreach, building social capital, and acquiring new skills and knowledge (Merriam, Caffarella, & Baumgartner, 2012; Tobias, 2016). Depending on the socio-political context of the time, ACE and its programmatic manifestations (which and how programmes are planned and carried out) can serve as an indication of the philosophical viewpoints of those involved, particularly educators and policymakers. Given the impact of neoliberalism on the ACE sector at the time of this case study, its presuppositions and impacts on educational policy will be explored in greater depth in later sections. The main philosophical foundations of adult education as identified by Bowl (2014) and Elias and Merriam (2005) are described below.

## Philosophical Foundations in Adult Education

Within the field of adult education, a number of philosophical traditions underpin the conceptualisation of the learner, of learning itself, of the role of the educator, and strive to solve the dilemma of the relationship between theory and practice (Elias & Merriam, 2005). These philosophies were shaped by the social, political and historical context in which they were developed (Bowl, 2014; Elias & Merriam, 2005). Whether explicitly articulated or not, philosophical views influence ACE policy and practice (Bowl, 2014), and shape ACE curricula. Five main philosophical traditions referred to in this thesis can be identified through frameworks found in the adult education literature (Bowl, 2014; Elias & Merriam, 2005): liberalism (i.e., Adler, Bloom, Hirsch), behaviourism (i.e., Skinner, Watson), progressivism/pragmatism (i.e., Dewey, James, Lindeman); humanism (i.e., Maslow, Rogers; Knowles), and radicalism (i.e., Freire, Gramsci, Thompson).

**Liberalism.** “The oldest and most enduring philosophy of education in the Western world is the liberal approach to education” (Elias & Merriam, 2005, p.17). The origins of liberalism lie in the work of early Greek philosophers (Socrates, Plato, and Aristotle) who aimed to produce, through education, ‘the good and virtuous person’ (Elias & Merriam, 2005, p.18). Adult education under the influence of liberalism is concerned with learning for the sake of learning, and focused on developing ‘cultured and knowledgeable’ individuals (Bowl, 2014). Programmes which support the view of learning as a vehicle for personal development, such as continuing education, and people who identify themselves as ‘lifelong learners’ might subscribe to the ideals of liberalism. In Aotearoa, New Zealand, the Continuing Education Programmes provided through the universities are an example of this tradition. One of the key proponents of liberal education philosophy, Mortimer Adler (1982), argued that there is no endpoint for learning, and therefore, it can be viewed a lifelong process (in Elias & Merriam, 2005, p.43). Other current adherents to this view are Allan Bloom (1987) and E. D. Hirsch (1987). Liberalism in adult education is not without its critics (e.g., Giroux, 1992; Pratt, 1992; Smith, 1992): some

authors have questioned the goals, content, and methods of liberal education; as well as its opposition to specialisation (vocationalisation), which has become prominent in adult education over the past decades (Elias & Merriam, 2005). Within the liberal tradition, there would have been a value connotation to argue for the state funding of adult education, however in recent decades, the withdrawal of state funding associated with neoliberalism policies have gained sway.

**Behaviourism.** In opposition to some of the tenets of a liberal view of education, behaviourism is chiefly concerned with educational activities which have observable, measurable, and quantifiable outcomes (Elias & Merriam, 2005). Based in experimental psychology (Bowl, 2014), educational behaviourists believe that the ultimate goal of education should be to “bring about behaviour that will ensure the survival of the human species, societies, and individuals” (Elias & Merriam, 2005, p.92). Some of the major philosophical influences on behaviourism are materialism (Hobbes), scientific realism and empiricism (Bacon, Locke, and Russel), and positivism (Comte, Ryle); other influences are René Descartes (and his theory on voluntary and involuntary behaviour) as well as Charles Darwin (and his work on instinctual behaviour in *Origins of Species*, 1859). The tradition’s emphasis is on the acquisition of skills, competency-based education, and outcomes-based assessment frameworks (Hyland, 1994), and manifestations of a behaviourist approach to education could be found in vocational training programmes as well as in some adult literacy programmes.

**Progressivism and pragmatism.** Centred on the human experience, the progressive/pragmatic view of education is that it should be learner-centred, practical and based on experience, and focused on developing the potential of the learner (Elias & Merriam, 2005). As such, progressivism represents a ‘third way’ point between liberal and behaviourist approaches. The chief proponent of this view of education was John Dewey (1916; 1956), who believed education was instrumental for social reform and for the



promotion of democracy (1916). The origin of community education is based on the ideals of progressivism/pragmatism (Elias & Merriam, 2005). In more recent years, somewhat problematically, instrumentalism in adult and community education has become linked with pragmatism, in response to changing societal values emphasising education-for-employment (Irwin, 2012).

**Humanism.** Drawing on some of the same philosophical tenets as liberalism, humanism's focus is oriented on recognising the freedom and dignity of individuals (Elias & Merriam, 2005), and focused on the personal development of the learner through facilitation and non-directive intervention from the educator (Bowl, 2014). One of the main proponents of this philosophical view was Carl Rogers (1969), who is considered an existential humanist (Elias & Merriam, 2005). Abraham Maslow (1976) was another adherent who stressed that self-actualisation was at the heart of a humanistic education, for which "the goal is assisting learners to grow and develop in accordance to their needs and interests" (Elias & Merriam, 2005, p.129). Malcolm Knowles popularised the concept of andragogy (how adults learn) as a theoretical framework for adult education based on humanistic foundations (Elias & Merriam, 2005). Peter Jarvis (1992) referred to being influenced by humanism, existentialism, and critical social theory ideals when he discussed the various paradoxes in human learning and how people grow through lifelong learning. Examples of programmes influenced by this tradition would be self-directed learning, human development seminars, and cooperative educational activities offered in various settings (e.g., community centres, libraries, churches).

**Radicalism.** A politicised approach, the work of Paulo Freire (1970, 1972) has been instrumental in shaping radical philosophies of education, which focus on challenging taken-for-granted assumptions relating to education (and society) as well as liberating, empowering, and transforming people through education. Radicalism in education is rooted in anti-colonialist and anti-imperialist struggles, as well as socialist movements (Bowl, 2014).

Radical education has been associated with political activism (e.g., feminism, anti-war, environmentalism) and self-determination struggles (e.g., Māori self-determination in Aotearoa New Zealand). Radical educationalists want to bring about profound changes in society, and believe that this can be achieved through ‘the collective development of knowledge and understanding’ which education provides (Bowl, 2014, in “Adult educator philosophies and values”). The Italian Marxist Antonio Gramsci (1971) whose work was aligned with the views of Freire and believed education had the power to challenge what he referred to as hegemony: “the condition in which society’s ideas, structures, and actions are dominated by a single class” (in Elias & Merriam, 2005, p. 173). Consequently, with this philosophical tradition education is positioned as a vehicle for changing culture and structures, instead of transmitting culture and maintaining structures (Elias & Merriam, 2005).

Philosophical stances are certainly not clear-cut and exclusive of tenets from other traditions (Bowl, 2014; Elias and Merriam, 2005). Bowl (2014) argued that they could be included in a spectrum of beliefs: “from more or less oriented to the status quo (conservative) to more or less oriented to social change (radical)” (in “Adult educator philosophies and values”). The conceptualisations offered through these various philosophical views can change; they emerged through a quest for truth, and as an attempt to define the role of education amidst the changes in societies, cultures, and people (Elias & Merriam, 2005).

Finally, understanding philosophical traditions in education can help educators (and students) navigate the diversity of programmes and educational opportunities. Signposts such as educational philosophies and the ‘learning spaces’ concept, described below, assist in interpreting the philosophies and contexts underpinning the field of adult and community education.

## ACE and Learning Spaces

The diversity of opportunities and contexts in adult education are sometimes described as ‘learning spaces’ (Benseman, Findsen, & Scott, 1996; Coombs, 1985, 1989; Merriam, Caffarella, & Baumgartner, 2012; Savin-Baden, 2008; Zepke, 2015). Coombs (1985, 1989) proposed a framework which organises learning into three categories based on where learning occurs: in a formal context (which includes some form of organisational sponsorship, such as continuing education programmes in universities), non-formal community-based activities (such as those offered through churches and libraries), and informal or self-directed learning (such as learning a language through a mobile app). This framework has since been expanded by other authors to include additional learning spaces, such as online learning (Merriam, Caffarella, & Baumgartner, 2012), and encompassing different learning opportunities which are intended and unintended (Jackson and Cooper, 2012), and liberatory and non-liberatory (Kucukaydin, 2010). Non-liberatory learning, whether in a formal, non-formal, or informal context, operates within the assumed socio-political and educational value systems (in Zepke, 2015, p.102); whereas liberatory spaces will aim to produce counter-learning, deconstructing taken-for-granted assumptions and systems, promoting a ‘fundamental structural change’ (ibid, p. 102). Yet another categorisation used in adult education which spans across categories assigned to ‘learning spaces’ is the concept of ‘lifewide learning’ (Barnett, 2010; Zepke, 2015). Lifewide learning involves: “learning in different places simultaneously. It is literally learning across an individual’s lifeworld at any moment in time. These places of learning may be profoundly different” (Barnett, 2010, p.2), with for instance an individual at a point in time being a student in a university, learning on the job outside of the university, learning in a sporting or cultural activity, and pursuing a self-directed learning project at home. Effectively, these spaces can overlap and are not necessarily mutually exclusive (Savin-Baden, 2008). The boundaries between learning spaces can be blurred, perhaps especially with informal and non-formal learning, which could easily be placed on the same continuum (Livingstone, 2012). As *Chalkle* was initially developed for the non-

formal and community-based educational contexts, I describe these below, before expanding on informal learning spaces.

**Adult education in a non-formal context.** Having already provided an overview of the main characteristics of adult and community education, this section will briefly expand on the concepts of non-formal and community-education, on which ACE is based. In contrast to courses and programmes for credit provided by tertiary education organisations, non-formal adult education includes programmes offered by social and civic organisations (public libraries, churches, community organisations, even workplaces). The offerings tend to be short-term, voluntary, typically involve a facilitator (or teacher) and a curriculum of some sort which may include learning objectives, though usually with few prerequisites and no certification (Merriam, Caffarella, & Baumgartner, 2012). The Non-formal and Community Education Task Force in Aotearoa New Zealand (1990) defined non-formal learning as: “refers to any purposefully organised learning process which is intended to serve an identifiable group with specific learning objectives and which is substantially controlled by the participants and/or local community” (cited in Tobias, 1996, p.12). As already discussed, definitions serve the political and social purposes in the context of the time, and this definition ensued from major educational reforms at the end of the 1980s and was used by various groups to advise on government educational policy in the Aotearoa, New Zealand context of the time (Tobias, 1996).

Brennan (1997) identified three subtypes of non-formal education programmes: the first subtype is a complement to the formal system; the second is an alternative to the formal system; the third is a supplement to formal education. In terms of pedagogies used in contemporary non-formal education contexts, Zepke (2015) grouped these into three types: “those which conform to the demands of the neoliberal state; those which do not actively oppose these demands but wish to adapt and reform them; and those which are liberatory and wish to reframe them” (p.105). One of the strengths of non-formal education is that its curriculum may provide a quick response to

national and global imperatives, and educational, social and economic needs; often when formal education would be too slow in its response (Tobias, 2016). Non-formal educational programs often expressly seek to address social justice issues and encourage participants towards social action (Merriam & Brockett, 2011). The section below describes community-based education as it pertains to non-formal contexts.

**Community-based education.** As a form of non-formal education delivered mostly by community organisations, voluntary organisations, and schools, the focus of community-based education is on developing the potential of individuals as well as their communities (Merriam, Caffarella, & Baumgartner, 2012; Fletcher, 1980; Tobias, 1996). This diverse field is populated with organisations which have an implicit educational purpose (e.g., WEAs), as well as others whose primary purpose may not be providing non-formal education. Indeed, the boundaries may easily be blurred between learning which occurs in non-formal community-based settings and leisure (e.g., learning through art centres) or training through workplaces (Gunn, 1996).

Robert Tobias (2016), an expert on adult and community education sector, describes the sector as “a social and educational movement” (p.78) predominantly concerned with the betterment of the community and populace it serves, whether it be through addressing issues such as sustainability (e.g., the New Zealand Association for Environmental Association ‘NZAEE’), racial inequalities (e.g., Multicultural Learning and Support Services ‘MCLaSS’), or literacy and numeracy (e.g., Literacy Aotearoa). The combination of its educational and social service orientations make for education which is learner-centred, practical, and can serve an immediate purpose for learners looking to “make changes in their personal lives and/or in society” (Gunn, 1996, p.150). Though the educational opportunities offered through community education are in high demand, the field is dependent on the work of educators employed on casual, hourly-paid contracts, or volunteers who donate their time

out of belief in a cause and in education itself (Gunn, 1996; Bowl, 2014; Tobias, 2016).

**Informal learning.** Informal learning is the third ‘learning space’ in Coombs’s (1985) typology and is considered more of a hybrid than the two other contexts (formal and non-formal); according to the author it is also the most prevalent form of adult learning. Coombs defines this type of learning as: “the spontaneous, unstructured learning that goes on daily in the home and neighborhood, behind the school and on the playing field, in the workplace, marketplace, library and museum, and through the various mass media” (ibid, p. 92). Generally, research has associated informal learning to public culture (see Sandlin, Wright, & Clark, 2013) and is often described as learning that often goes unrecognised, embedded into everyday life, unstructured and (unlike formal and non-formal education) without organisational sponsorship (Illeris, 2004; Livingstone, 2001; Merriam, Caffarella, & Baumgartner, 2012). Although this type of learning is not necessarily conceived as having an educational purpose, several authors have argued that its impact on adults’ understandings of the world and of themselves should not be neglected (Sandlin, Wright, & Clark, 2013; Zepke, 2015). These diverse informal practices have the capacity to reinforce or critique political, social, cultural, and economic beliefs and practices (Zepke, 2015).

Schugurensky (2000) discerned three types of informal learning, which differ in terms of intentionality and awareness at the time of the learning experience: self-directed learning, incidental learning, and tacit (or socialisation) learning. Perhaps the most relevant type of informal learning related to this case study is self-directed learning: “representing the independent pursuit of learning in natural settings, with or without the support of institutional resources” (Merriam, Caffarella, & Baumgartner, 2012, p.37). Although this type of informal learning may seem incidental or tacit, it focuses on individuals seeking out learning opportunities, and making meaning of their experiences through critical reflection (Freire, 1970; Hrimech, 2005; Zepke, 2015). Finally, a common misconception is that informal learning only occurs on an individual basis but in fact it can also happen in groups

(Schugurensky, 2000): examples of informal learning in groups would include learning in the workplace and learning through various recreational pursuits (e.g., through sporting activities, reading, and hobbies).

## **Lifelong Learning**

Across various opportunities and contexts of learning, and at the intersection of multiple educational philosophies, the concept of lifelong learning has made its way to become a prominent feature of education policy, both in Aotearoa New Zealand as well as globally. John Dewey (1916) was one of the first to argue for an education which was lifelong:

Education must be reconceived, not merely as a preparation for maturity (whence our absurd idea that it should stop after adolescence) but as a continuous growth of the mind and a continuous illumination of life. In a sense, the school can give us only the instrumentalities of mental growth; the rest depends upon absorption and interpretation of experience. Real education comes after we leave school and there is no reason why it should stop before death (as cited in Elias & Merriam, 2005, p. 62)

Since Dewey's progressive view of lifelong education, the term has gone through various conceptualisations; one of the important shifts being referred to as 'lifelong learning' instead of 'lifelong education' (originally adopted by UNESCO) from the mid-1990s (Jarvis, 2009). An impact of this shift was a change in focus, "from formal to non-formal and informal learning experiences, within and outside of educational institutions, within the workplace and given the virtuality of the new cybernetic culture, virtually everywhere" (Torres & Mayo, 2013, p.9).

Lifelong learning has been ascribed competing value connotations, for example, one focused on individual/social/community development and one focused on economic development and global competitiveness (Bowl, 2014; Field, 2005; Zepke, 2009). Jarvis (2009) argues that learning begins at a point of disjuncture, in response to changes in conditions; both connotations for lifelong learning, above, serve as a response to that change, one seeking to understand it and grow from that understanding, the other as a response to changes in global imperatives (forcing people to learn in order to adapt to the

new imperatives). In the latter, the responsibility is placed with the individual to develop the knowledge and skills in order to improve their ‘productivity’ and ‘contribution’ to a healthy economy (Olssen, 2006). In contrast, a Freirian view of lifelong learning would argue for a social change purpose for education (Freire, 1970), encouraging social and political changes “towards more justice, more equality and more democracy” (Martin, 2006, p.15).

Adult and community education serves to promote the culture of lifelong learning, and it acts as a pathway to pursue learning opportunities once compulsory schooling is complete (Bowl, 2014; Tobias, 2016). At the same time, the concept of lifelong learning has had an impact in shaping the value assigned to ACE, often cited as one of the instrumental goals related to ACE policy and to tertiary sector policy more widely in Aotearoa New Zealand (Leach, 2014). How lifelong learning and adult and community education are defined and positioned, by international organisations, national governments, and policymakers, will impact the support they receive in terms of funding and recognition. Both concepts seem fraught with ambiguities, a reminder that they are both contextual and therefore at the service of social and political agendas (Jarvis, 2009; Tobias, 1996).

## **Political Nature of ACE**

Throughout its history, adult and community education has been characterised as inherently political and therefore susceptible to changes in political discourses and ideologies (Bowl, 2014; Leach, 2014; Tobias, 2016). For example, in the current political context of Aotearoa, New Zealand, as well as on a global scale, ACE is subject to dominant neoliberal discourses and often serves to enact imperatives promoting economic development and global competitiveness (see Bowl, 2014; Leach, 2014; Tobias, 2016; Zepke, 2015). However, this was not always the predominant view of adult and community education, and a few authors canvassed for this research project have traced the changes in the conceptualisations of ACE and how it was represented in educational policy (Bowl, 2014; Leach, 2014; Tobias, 2016; Zepke, 2009). Indeed, ACE has been historically conceptualised primarily in terms of



outreach and civic education, which Clyne (1972) describes as being concerned with “enabling individuals to understand more completely the structure of society, the powers and responsibilities of local and national governments, and capacity of men and women to create public pressure, influence and change” (xiii, p. 21).

ACE has been linked with the types of knowledge and skill-based transformation and development needed to adapt to changing occupational, social, economic and political realities, on both an individual and societal level. Proponents of radical/critical educational theory would argue that ACE can be used as a vehicle challenging existing power structures and economic inequalities, and therefore have a transformative purpose (see Bowl, 2014; Field, 2009; Freire, 1970; Hemphill & Leskowitz, 2012; Lovett, 1988). As such, ACE can be located within the field of social movement studies, by being linked to social movements; it can also ‘be seen, itself, as a social movement’ (Hall, 2009; Hall & Clover, 2005; Tobias, 1996). Social movements represent agents of change and resistance in society (e.g., socialist, labour and trade movements, feminist, peace, and environmental movements); in this view, ACE becomes the agent of social and political change, aiming for greater democracy and social justice, for instance ‘Education for Citizenship’ (Tobias, 1996).

As much as ACE has transformative potential, learning, what is learned and how, is also influenced by the nature of society at that particular time; and the nature of society at any particular point in time determines the emphasis placed on ACE (Merriam, Caffarella, & Baumgartner, 2012; Newman, 2014). For example, Hill (2008) highlights the role of the political, social and economic context in adult education: “What is going on just now affects learning to be, to become, to belong, and to act” (p. 83). As such, the implementation of neoliberal policies across developed nations since the 1980s (e.g., in the UK, Australia, across Europe and North America) have had a significant effect on the ACE sector. By shifting the provision of significant state services and goods to the private sector, dominant neoliberal ideals and policies have heralded a weakening view of education as a public good and increasing

rhetoric of education as a marketable commodity (Bowl, 2014; Leach, 2014; Tobias, 2016; Zepke, 2009). It has also made the sector highly vulnerable to changes in politics and the economy, as illustrated by this quote from UNESCO:

The fluctuation and instability of public funds for adult education further underscores the sensitivity and vulnerability of this sector. With an unstable legal and financial framework, adult education provision is extremely susceptible to even minor economic or political change. (UNESCO, 2009, p. 56)

## **ACE and Social Enterprises**

Under neoliberalist governments the increasing withdrawal of the state from of adult and community education has forced some ACE providers to look for funding opportunities beyond the state. Hands off policies to funding ACE are predicated on the expectation the private sector will fill the vacuum if it is determined that there is a market for the educational goods and services. The ACE sector is forced to look for alternative means of funding. Some concerned with preserving the social justice quotient of community education see value and promise in social enterprises as a commercial means for maintaining their aspirations for adult and community education (Bowl, 2014). Social enterprises have seen a recent rise in popularity internationally as well as in Aotearoa New Zealand, and the few research studies available in this area characterize them as hybrids of for-profits and not-for-profit organisations (Davis, 1997). Unsurprisingly, social entrepreneurship has been promoted as a solution to counter the impact of neoliberalist policies, that is, the withdrawal of state funding in areas of social provision, including adult and community education (Abu-Saifan, 2012; Bowl, 2014; Bourzaga & Defourny, 2001; Grant, 2008; Kerlin, 2009; Thompson, 2008). Described as 'businesses with a social purpose', social entrepreneurship can be seen as combining commitment, ingenuity and social purpose with a promise of self-sufficiency (Bowl, 2014). New Zealand's Department of Internal Affairs defines social enterprises as:

using commercial methods to support social or environmental goals. They principally reinvest surpluses in the social/environmental purpose rather than maximising profit for shareholders and owners. Potential benefits of social

enterprise include innovative responses to societal issues, new employment opportunities, and sustainable income generation (Department of Internal Affairs, 2016).

Similarly, Dart (2004) describes activities of social enterprises as being jointly “prosocially and financially motivated in a manner described as double bottom line”, that is with an emphasis on generating revenue in order to create social value (p. 413).

The emergence of social-enterprise-based ACE initiatives, such as *Chalkle*, lends weight to the argument that neoliberalism has indeed had a significant influence on the ACE sector. Some critics are sceptics of the social enterprise model in the ACE sector as an alternative source of funding. Indeed, some authors argue that social enterprises could in fact be enacting neoliberalism (Bowl, 2014; Grant, 2008; Pattie & Johnston, 2011). Marion Bowl (2014) for example would argue that instead of being a solution to cuts in government funding, social enterprises could potentially further exacerbate cuts to public provisions of ACE and “result in patchy and unstable pattern of provision” (in “The bigger picture: Strategy and advocacy”). As a recent development in the ACE sector, the concept of social enterprises for educational provisions certainly merits further analysis and research.

## **ACE and Educational Technology**

Commensurate with the rise of social enterprise-based startups has been a flourishing of what is known as the ‘edtech’ sector, which includes learning-focused technology products and services (such as games, apps, educational software, courseware, and environments). Seels and Richey (1994) define the concept both in terms of *equipment* and *method* to complete the task of education: “Instructional technology is the theory and practice of design, development, utilization, management and evaluation of processes and resources for learning” (p.36). This definition also encompasses the various functional domains of edtech: from classroom technologies, to content creation tools, research tools and communication technologies, and so on.

It is assumed technology will only increasingly impact the practices of learning and teaching (Fahrni, 2013; in Zepke, 2015). This sector is already growing rapidly in Aotearoa New Zealand as well as globally, representing US\$15 billion per annum (Education Review, 2013). The inaugural New Zealand educational technology (edtech) conference was held in Wellington in April 2013. Zepke (2009) argued that, though neoliberalism might adapt and change in the future to suit global market priorities, it is likely to retain a strong influence on the adult and community education sector. However, educational technology will grow apace with global technological advancements and will come to play an increasingly important role in all contexts of adult education, through transmission learning (e.g., Massive Open Online Courses – MOOCs) as well as more individualised and interactive experiences, even creating spaces for ‘liberatory’ learning. With technology gaining ground as a key cultural infrastructure (and the widespread use of social media networking sites like Facebook and LinkedIn), a case can be made to explore how technology can influence the way adult and community education is promoted, organised, and delivered. More research is needed in this emerging field of literature to evaluate the benefits of a collaboration between the ACE sector and educational technology.

## **Empirical Research on ACE**

In searching for relevant empirical research on the ACE sector, it became apparent that there was a lack of international and local research on ACE provision, and a small and disparate literature on teaching and learning in ACE contexts, with studies typically small-scale (e.g., Bowl, Walters & Tobias, 2008; Geertshuis, 2009). The lack of funding for adult and community education has inevitably led to the sector being under-researched; which is one of the consequences of being a low priority area for government. Without government funding, there is little incentive to carry out academic empirical research. Most of the literature on ACE is practitioner-focused, which is a reflection of ACE being a ‘purposeful practice’, one embedded in a set of beliefs and values about adult and community education (Bowl, 2014). Some authors,

such as Bowl (2014) and Elias and Merriam (2005), argue that there is a need for formal theory and for reflective practitioners who will be ready to critically examine informal theories and long-held assumptions which can be both limiting and exclusionary. However, there is also a reasoning for pushing back against the positivistic approach in ACE:

the applied knowledge ('knowing before doing') prescriptions of positivistically defined professional practice do not well withstand the ambiguous, constantly shifting demands of actual practice in which conflicting values, perspectives, and expectations reveal no immediately or obviously right choice about what to do (Wilson & Hayes, 2000, p.56).

A number of landmark publications<sup>1</sup> on adult and community education in Aotearoa, New Zealand, are worth noting for their important contribution to theory, policy, and practice in the ACE field, particularly: *Towards a Learning Society* (Boshier, 1980) and *The Fourth Sector: Adult and Community Education in Aotearoa New Zealand* (Benseman, Findsen, & Scott, 1996). More recently, *Adult Education in Changing Times: Policies, philosophies and professionalism* (Bowl, 2014) has provided an insightful view into the experience of adult educators, both in Aotearoa, New Zealand, as well as in the UK. Finally, *Fifty Years of Learning: A history of Adult & Community Education in Aotearoa from the 1960s to the present day* (Tobias, 2016) has been a major contribution to tracing the changes in policy which have impacted the ACE sector in Aotearoa, New Zealand, in the past five decades. No-one has, until now, analysed a hybrid model of adult and community education like *Chalkle*, which combines characteristics of ACE, social enterprises, and educational technology; therefore, this case study will make a contribution to all three fields of enquiry.

Having set the scene for ACE in Aotearoa, New Zealand, the context in which *Chalkle* has evolved and operated since 2012, the next chapter will focus on the approach taken to research *Chalkle* and outline the methods for this case study.

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<sup>1</sup> Also see: Williams, B. M. (1978). *Structures and attitudes in New Zealand adult education, 1945-75*. Wellington: NZ Council for Educational Research.



## Chapter 3: Methods

When I first met the *Chalkle* co-founders in May 2014, at the Enspiral Network co-working space in Wellington, I was exploring potential ACE-related topics for my master's degree and we discussed the possibility of doing research about their edtech social enterprise. In August 2014, I began a part-time Master of Arts in Education and decided to focus my research on alternative models of ACE in Aotearoa, New Zealand using *Chalkle* as a case study. I wanted to learn more about *Chalkle*'s hybrid and fluid nature, and explore its relevance (in terms of opportunities and challenges) in the social, political and cultural context of ACE in Aotearoa, New Zealand. I also wanted to examine the aspirations and motivations of co-founders, learners, teachers, champions, and providers involved with the organisation. This chapter will serve to explain my choice in regards to the research design as well as the research methods deployed, and will provide information about the participants as well as outline the importance and the limitations of this study. My approach is influenced by Stake (1995), alongside Merriam (1998), both well-known for their contributions to case study research methodology. *Chalkle*'s key components, and related terms and concepts used throughout this thesis, are described (with accompanying screenshots) in Appendix 1.

### Research Design

I chose an exploratory qualitative case study research design in order to provide an in-depth exploration of the *Chalkle* organisation and the context in which it was rapidly evolving. My approach to case study research was inspired by Robert Stake's foundational text, *The Art of Case Study Research* (1995), and his constructivist view of epistemology. My view of knowledge aligns with his: the way in which we know and understand the world is based on socially-constructed interpretations of our experience. I also subscribe to Yin's view of case study research which outlines that it is essential to provide a rich description of the phenomenon and also of its context, as the boundaries between the case and the context are blurred (Yin, 2014). That being said, I

find it more difficult to adhere to his positivist orientation and emphasis on instrumentality. In contrast, Merriam (1998) argues that “reality is not an objective entity; rather, there are multiple interpretations of reality” (Merriam, 1998, p. 22). As a researcher, my role was to gather these interpretations (qualitative data obtained through document review, interviews and observations) and provide my own interpretation of their significance in the case being investigated (Yazan, 2015). My research design is therefore a mix of Stake’s and Merriam’s approach to qualitative case studies.

One of the main differences in regards to the design of case study research between Stake and Merriam is that Stake believes researchers should have the flexibility to make major changes to the design along the way, as they proceed from design to research, or as new issues and questions become apparent. He draws on Parlett and Hamilton’s notion of ‘*progressive focusing*’, which is built upon the assumption that it is not feasible to plan the entire study in advance; researchers are therefore called to focus the lense of their research as new issues emerge (Parlett & Hamilton, 1976; in Stake, 1995). I found this to be a challenging approach as a novice researcher and I will discuss some of these challenges in the limitations section at the end of this chapter.

Merriam’s approach, in contrast, is much more structured and her research designs involve five steps to follow in sequential order: conducting literature review, constructing a theoretical framework, identifying a research problem, crafting and sharpening research questions, and selecting the sample (purposive sampling) (Merriam, 1998; Yazan, 2015). Although guidelines such as those offered by Merriam can be useful, this more structured approach did not lend itself to my study as well as Stake’s flexible method. *Chalkle*’s rapid evolution and fluidity meant that new issues and questions were constantly emerging during the course of the research and steps needed to be revisited, and adjusted, regularly.



## **Data Collection and Research Methods**

As mentioned previously, because *Chalkle* is relatively new in the ACE space and is evolving due to its startup nature, it was important to use varied methods of qualitative data collection in order to generate a rich description of this learning community. The data collection methods deployed were the ones traditionally associated with qualitative case study research: reviewing documents which pertained to the organisation's historical developments (*Chalkle* website, survey results, as well as published interviews with *Chalkle* co-founders), participant-observation in seven classes, and ten semi-structured interviews with consenting participants.

As an apprentice inquirer, I thought it would be beneficial to practise observing classes and conducting interviews in order to enhance my skills as a researcher; with this in mind, I observed (and participated) in a *Spanish Tapas* class organised through chalkle.com and interviewed two of my friends in order to practice my interviewing skills. This also enabled me to clarify some of the initial interview questions and learn how to take notes while observing and participating in a hands-on class.

The data collection methods I used are explained in greater detail below, where I have outlined the chronology of my research. Though Stake's protocol for data collection suggests that there is "no particular moment when data collection begins" (Stake, 1995, p.49), he strongly encourages researchers to prepare a data gathering plan. My plan outlined data sources and descriptions of classes/activities (including costs), the dates communications were sent, suggested techniques for reporting, and allocated times for individual interviews or other follow-ups.

## **Chronology of the Research Project**

The table below outlines the chronology of this research project, including a data collection period which spanned a seventeen-month period, allowing a good view into the evolution of *Chalkle* as an edtech startup. Although it appears as if this research project was carried out by following steps in a

sequential order, the steps were often revisited, as argued by the Stakian approach to case study research (1995).

Table 1. *Chronological Steps for this Research Project.*

<i>(Prior to start of research)</i>	
Joined <i>Chalkle</i> on MeetUp	October 2013
Met <i>Chalkle</i> co-founders at the Enspirial Network space	May 2014
Discussed research project with co-founders Received documents from co-founders: surveys (Aug. 2012 and Dec. 2013) Report on ACE Practitioner Standards	June 2014
<i>(Start of research)</i>	
Registered in MA in Education (part-time) Received email confirmation of participation from <i>Chalkle</i>	August 2014
Submitted research proposal Outlined research methodology to <i>Chalkle</i> in an email	September 2014
New chalkle.com website launched Received documents from co-founders: newsletter sent to teachers and providers	October 2014
Submitted amended proposal and reviewer feedback forms	January 2015
Attended first class as practice (Spanish Tapas)	February 2015
Submitted Human Ethics Committee (HEC) application	April 2015
Received HEC approval Received feedback from co-founders: on providers to approach for interviews and class observations, and on interview questions Practiced interviews with two friends Contacted providers for data collection: request for interviews and request for class observations Observed first class (Ekodo) Conducted first interview (Provider 1)	May 2015
Observed second class (Nobody Gets Out Alive) Conducted second interview (Provider 2)	June 2015
Observed third class (Facilitation)	July 2015
Conducted interviews with co-founders Observed fourth class (All About Bees)	August 2015

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Posts to Facebook ( <i>Chalkle</i> and Wellington Timebank pages) to recruit learners for interviews	September 2015
Conducted interview (Teacher 1)	
Observed fifth class (Supplements)	
Conducted interview (Learner 1)	October 2015
Observed sixth class (Work Less, Save the World)	
Observed seventh class (Tech for Non-Tech)	November 2015
Conducted interviews (Learner 2 and Learner 3)	
Conducted interview (Teacher 2)	December 2015

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<i>(Post data collection)</i>	
Data analysis and writing thesis	Jan. – Oct. 2016

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## Methods in Detail

**Method 1: document review.** If a researcher is imaginative and resourceful, as Merriam suggests (1995), documents can represent a rich data source for their research project, which are not subject to the same limitations as other forms of data collection like interviewing or observation. Because of the nature of *Chalkle*, being an online edtech startup, new material becomes available regularly, both published *by* and *about* the company. I scanned a large number of documents in order to select the most appropriate sources to analyse and provide a rich description of *Chalkle* and its impact on the ACE space in New Zealand, particularly in Wellington.

An initial sourcing of online material began shortly after meeting the *Chalkle* co-founders for the first time in May 2014, and the last interview was conducted in December 2015. Prior to contemplating the idea of doing research on *Chalkle* for my MA degree, I had registered with the *Chalkle* group on MeetUp in 2013. Additionally, since the last interview in December 2015, I have consulted online material which included public records and personal documents, all of which were obtained online (public access) or in an electronic version sent to me by the *Chalkle* co-founders. The full list of material (documents) includes: published media interviews with the co-founders, comments from participants in *Chalkle* classes posted on the Meetup website,

weekly digest newsletters, documents generated for this research including interview transcriptions, field notes from class observations, and screen shots of classes offered through the chalkle.com platform. The material I received from the co-founders pertains to the organisation's historical developments, including survey results from their members in August 2012 and December 2013, a guide sent to organisers of classes (October 2014), and a report on practitioner standards which included results pertaining to *Chalkle* (ACE Aotearoa, 2014).

Finally, I performed a qualitative content analysis of this material to see what themes emerged from the data, following a constant comparative analysis method (Scriven, 1993; Strauss & Corbin, 1998). I will describe this method and the steps I carried out in greater detail in one of the following sections.

***Recruitment of participants for class observations and semi-structured interviews.*** The other two methods of data collection, class observations and semi-structured interviews, required the recruitment of participants. The protocol for this was approved by the Human Ethics Committee and more information on ethical considerations for this research project are outlined later in this chapter. I discussed the recruitment of participants for interviews as well as class observations in detail with the *Chalkle* team in April 2015.

The ten interview participants were adults living in the Wellington region, with the exception of two participants. For the class-observations, the participants consisted of the learners, the teacher of the observed classes and on occasion, the provider who organised the classes through the chalkle.com platform (the provider was usually working on the registration desk and providing tea/coffee to the class participants). The participants in the semi-structured interviews were people who had interacted with the chalkle.com platform to various degrees and at various times (learners, teachers, providers, champion, and co-founders). The list of interview participants and their

relationship with *Chalkle* can be found in Appendix 2. Below is an abridged version in table format:

Table 2. *Interview Participants by Category: Gender, Age, Education Level & Geographical Location.*

<b>Category</b>	<b>Gender</b>	<b>Age Group</b>	<b>Education level</b>	<b>Location</b>
Learner 1	W	20-25	University	Wellington
Learner 2	W	50-55	University	Region
Learner 3	W	30-35	University	Wellington
Teacher 1* (also a learner and provider)	W	25-30	University	Wellington
Teacher 2* (also a learner)	M	30-35	University	Wellington
Provider 1* (also a learner)	W	20-25	University	Wellington
Provider 2	W	20-25	Alternative tertiary diploma	Wellington
Champion 1	W	25-30	University	Region
Co-founder 1	W	30-35	University	Wellington
Co-founder 2	M	30-35	University	Wellington

Specific invitations to participate for people like the co-founders, the providers, the champion, and the teachers were sent by email or through the chalkle.com platform. For the class observations, *Chalkle* provided a list of potential providers to approach. I focused on the suggested providers (instead of the teachers of the classes) because the providers were usually the ones who were most familiar with the chalkle.com platform because they used the platform to organise classes. I sent a message to the providers via the platform briefing them on my project and requesting their consent for my enrolment as a participant observer/researcher during their class. I also invited them for a follow up interview if they were willing to provide more information. Attached to the message was the information sheet and the consent form. The providers were the conduit to the teachers, and I asked them to pass on this information. Once I received the authorisation from the provider and the teacher, I would observe the class and take field notes (and hopefully get an interview organised for a later date).

Recruiting learners for interviews was more challenging as I did not have access to the registered learners for the classes. Therefore, the invitation

was opened up to anyone who would agree to participate (i.e., not targeted to specific individuals) and I reached out through notices on Facebook (on the *Chalkle* and Wellington Timebank pages) and by doing a quick presentation at the start of a class, inviting them to approach me after class if they agreed to be interviewed. In terms of class observations, getting the permission from learners was more straightforward: I would distribute my information sheet at the beginning of each class and do a short presentation, outlining that I would not be taking notes pertaining to the individual participants in the class.

**Method 2: participant-observation in classes.** I attended seven classes as a participant-observer; this strategy aligns with what Denzin and Lincoln (2000) recommend for an ‘interpretive and naturalistic approach’, which offers opportunities to study *Chalkle* in context and interpret the meanings learners and teachers assign to *Chalkle*. For some of the classes, mostly those offered by the Wellington Timebank, I paid the registration fee (\$10 per class), which was used as a contribution to a fundraiser for the organisation (i.e., the teachers would ‘donate’ their time teaching the classes and the course fees were used as a fundraiser for Timebank). The payments were channelled through Paypal on the *chalke.com* platform. Some of the classes I observed were free and others agreed to waive my registration fee (i.e., ‘Tech for Non-tech’). The classes I observed are listed in the Table 3 below, also indicating the registration fee for each class, the date, the duration, and the provider of the class.

Table 3. *Classes Organised Through chalkle.com Observed as a Participant.*

<b>Date / duration</b>	<b>Name of class (price)</b>	<b>Provider</b>
26 May 2015 60 minutes	Ekodo - Staunchly Assertive Compassion in Social and Environmental Action (free)	Orientation Aotearoa
11 June 2015 90 minutes	Nobody Gets Out Alive (\$10)*	Wellington Timebank
17 July 2015 60 minutes	Facilitation: Bringing diverse voices into the room (free)	Enspiral Academy

25 August 2015 90 minutes	All About Bees! (\$10)*	Wellington Timebank
15 September 2015 90 minutes	Which Supplements? (\$10)*	Wellington Timebank
20 October 2015 90 minutes	Work Less, Save the World! (\$10)*	Wellington Timebank
13 November 2015 Full day	Tech for Non-Tech (\$574)	Enspirale Academy

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\*the money raised from the class registration fees was used as a fundraiser for the Wellington Timebank.

Because the classes organised through the chalkle.com online platform take place in person in a wide variety of physical locations, I thought it would be important to pay attention to the physical environment in which the classes took place and describe this in detail. As Stake says, “the physical space is fundamental to meanings for the researchers and most readers” (1995, p. 63). I took generous notes on the physical environment of the classes (room, building, set up, decor, entryway, location) as well as how the classes were conducted. Without noting what was said verbatim, I would note the tone of the teacher (if they used humour for example), the teaching techniques they were using, as well as the interruptions and questions from the learners (frequency, response from the teacher, etc.). My field notes from the class observations included a description of the space and teaching methods, direct quotations from the participants (teachers/learners), notes on interactions between the learners and between the learners and the teacher (e.g., whether they appeared to know each other or not), as well as my comments as an observer (Merriam, 1998).

**Method 3: semi-structured interviews.** Semi-structured person-to-person interviews were also conducted as part of this research project. This followed a methodology proposed by Merriam (1998), in order to investigate participants’ views and thoughts about *Chalkle* as well as adult and community education; information which other methods such as

observation and document review could not provide inasmuch detail. The wording of the questions was discussed with my supervisor as well as with the *Chalkle* co-founders, and was checked for understanding with two friends. Although the questions were largely determined in advance, the exact wording and order of the questions would vary depending on the interaction between the interviewee and myself. Early on in the interviewing process, I had to change the wording of a particular question because of its lack of clarity.

Four providers accepted my request to observe their classes, and three providers accepted my request for an interview (one of the three providers was also the teacher of the classes she organised, and her interview is listed as *Teacher 1*). Although I initially thought the interviews would take 30 minutes, they often lasted close to an hour, which included chatting at the beginning while setting up the voice recorders, talking through the information sheet and consent form, as well as a discussion at the end when we had finished going through the interview questions. The interview guides (see Appendix 3) included between 7-10 questions (depending on the interviewee) and I used follow-up questions and probes in order to clarify information. I used two voice recorders during the interviews, just in case one would stop working, and I would also take notes during the interview. The locations for the interviews varied, three took place at the Enspiral Network shared spaces (on Courtenay Place and Cuba Street) and the others were at cafes around the city including the Wellington Public Library and Victoria University. I met with the champion at a cafe in her region for her interview and conducted a phone interview with the learner who lived outside of Wellington. I transcribed the interviews verbatim, and transcription was completed by the end of December 2015.

## **Data Analysis**

Stake views the data analysis procedure as “making sense of first impressions and final compilations” (1995, p.71) and believes it requires researchers to rely on their impressions and intuitions. Merriam (1998) complements this view and describes data analysis as “the process of making sense out of the data...



[which]... involves consolidating, reducing, and interpreting what people have said and what the researcher has seen and read - it is the process of making meaning” (p.178). Indeed, the constructivist approach, adhered to by Stake and Merriam, suggests to undertake data collection and data analysis simultaneously; which may lead to major changes in the phases of the research project as the preliminary analysis of data unfolds. This represents one of the key characteristics of qualitative research which would be referred to as an emerging design (Yazan, 2015).

In order to analyse the collected data, I drew on constant comparative analysis from grounded theory methodology, which enabled me to study emerging themes and look for relationships between them. Grounded theory methodology involves “a process of interpretation carried out for the purpose of discovering concepts and relationships in raw data and then organising these into an explanatory scheme” (Strauss & Corbin, 1998, p. 11). This was the most suitable framework to finally arrive at a storyline which explained *Chalkle*'s evolution and relevance in the social, cultural and political context of Aotearoa, New Zealand. I used an open coding protocol to draw out patterns and cluster data into emerging themes (Gibbs, 2008; Strauss & Corbin, 1998). Three major themes and additional sub-themes were identified through this process and form the basis of chapters 4 and 5 containing the research findings: 1) What is *Chalkle* and how does it function as a form of adult and community education in Aotearoa, New Zealand?; 2) What are the motivations of learners, teachers, providers, champions, and the co-founders for participating in ACE and engaging with *Chalkle*?; and 3) What are the aspirations, challenges, and opportunities for the future of ACE and of *Chalkle*?

## **Credibility and Trustworthiness**

Following Merriam's advice in regards to ensuring credibility and trustworthiness in qualitative research (1998), I made efforts as the researcher to record a very thorough description of events, to be present and alert during observations, and to foster genuine interactions with participants involved in

my study. During the class observations, I registered and attended in the same way as the other learners, sat with the other learners, and participated in activities with the other learners as appropriate. During the interviews, I made sure the participants were comfortable by meeting them at a time and location which suited them best, explaining how the interview process would unfold, and checking with them at the end of the interview if there were things they wanted to add which we had not covered. Additionally, the scope of the data analysis, through using a constant comparative approach, facilitated the study of *Chalkle* from various viewpoints (providers, teachers, champion, founding members, and learners), explored alternative meanings, and enabled data triangulation in order to ensure the authenticity and trustworthiness of the findings. Finally, I also used ‘member checking’ as an extra measure to validate the findings, especially when the findings were unclear or needed additional explanations, which was the case for two of my interview participants (Creswell, 2014).

## **Ethical Considerations**

My application to the Human Ethics Committee (HEC) was approved in May 2015. In this application, I discussed how I would broach potential ethical issues in regards to data collection as well as during the analysis and dissemination of findings. I also discussed how I intended to conduct myself in my relationship to research participants. As Merriam highlights:

Although researchers can turn to guidelines and regulations for help in dealing with some of the ethical concerns likely to emerge in qualitative research, the burden of producing a study that has been conducted and disseminated in an ethical manner lies with the individual investigator (1998, p.219).

When I was collecting data, I made sure to receive informed consent from my participants by clearly and transparently articulating the purpose of my research. Consent for class observations and interviews was obtained by distributing information sheets and consent forms as well as by doing a short presentation at the beginning of each class to explain the purpose of my

research. It is important to note that in undertaking participant-observation research, obtaining signed consent forms from context participants is neither always practical nor appropriate. Instead, having previously obtained consent from the providers and teachers, if learners were uncomfortable with letting me observe the class, they had an opportunity to voice this at the beginning of the class to the teacher. Fortunately, everyone was willing to let me observe the class and often learners would approach me after the class to ask questions about my research and offer their support.

During data analysis and through reporting, I made sure to protect the identities of the participants in the communication of the results, which was relatively straightforward when reporting on the class observations as I was not recording information about individual participants (learners). This being said, because of the nature of the study and the fact that I was investigating *Chalkle* which was a relatively small community, the co-founders, providers and teachers could be identifiable. This was stated in the information sheet and consent form and I received a sign off from the individual participants concerned. Additionally, because of the commercial sensitivity of the organisation, I shared the key findings from my study with the *Chalkle* co-founders and gave them an opportunity to elaborate or respond if they thought it would be appropriate to do so. This information has been included when relevant.

In order to show my appreciation for supporting my research project over the last two years, I have acted as an advisor for *Chalkle* on the topic of recent surveys to their providers, by helping to develop survey questions and participating in a debrief session discussing the results. I also plan to organise classes through the chalkle.com platform on topics that *Chalkle* believes would be interesting and relevant for their community of learners.

## **Importance and Limitations of Study**

I believe the study of *Chalkle* and its fluid emerging nature lent itself to a more flexible approach as promoted by Stake. That being said, Stake has been criticised for providing little guidance or structure in his approach to case

study research, making it difficult particularly for novice investigators to know what actually constitutes sound qualitative case study research (Yazan, 2015). Although it was challenging to capture the essence of *Chalkle* (being a startup, its orientation and mission was revisited regularly), I think it was an advantage for me as a part-time student to have a chance to investigate *Chalkle* over a longer period of time (July 2012 to December 2015) and therefore have the opportunity to study its different iterations over this period.

This type of case study aims to offer a detailed analysis of a particular case; however, it has been argued that the findings from these studies may or may not be very generalisable and can also be prone to observer-bias (Patton, 2002). Cross-checking information with participants was easier in regards to interview transcriptions, but it was not readily accessible within the process of observing classes, which relied solely on my interpretation of events. It would also have been desirable to interview additional participants, especially learners, teachers, and providers who were not using *Chalkle* in order to find out the reasons why they chose not to engage with the organisation as well as to provide a comparison between the populations.

Finally, I believe the findings can make an important contribution to the exploration of an alternative (non-state) and hybrid model of ACE in Aotearoa, New Zealand, whether generalisable or not, and hopefully expand our view of what could be possible in the adult and community education space.

## Chapter 4: Findings - Context

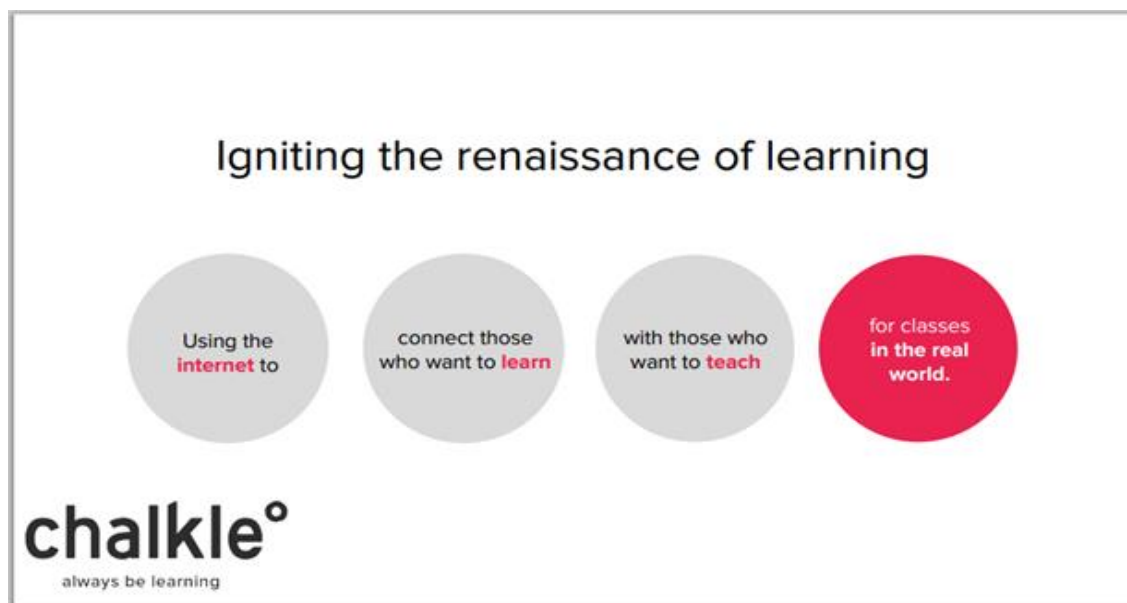
The results featuring the main findings from this research project will be organised in two chapters. I begin with a biography of *Chalkle* and a description of its changing nature and evolution during the period of July 2012 to December 2015, setting the scene for the context of this case study. As this research project is a case study of *Chalkle* and the organisation itself is the main subject of this investigation, its description will be referred to as a biography. This approach gives the opportunity for the description to stand on its own in terms of research data; it allows for the description to be analysed for connections between the socio-political dimensions of ACE in Aotearoa, New Zealand, and therefore to reveal larger meanings (Patton, 2002). A biography also carries the sense of an account of the life (or a period of the life) of a living organism, and *Chalkle* is very much a living, fluid, and changing entity. When I use quotes from interview participants in this chapter, I will refer to their role with the organisation (e.g., Co-founder 1, Learner 2).

This chapter presents the results from data collection and analysis and will draw on interview transcripts (mostly with the *Chalkle* co-founders), impressions obtained from class observations, as well as information gathered from document analysis (websites: *Chalkle*, Enspiral Network; newsletters from ACE Aotearoa; as well as media interviews with the *Chalkle* co-founders). In the next chapter, I present results which emerged from individual interviews with the participants according to two key themes: the motivations for engagement with ACE and with *Chalkle*, and the aspirations, challenges, and opportunities for ACE and for *Chalkle*. Each theme will also include a brief discussion of the findings. A more in-depth discussion of the findings, linking with the literature on adult and community education, is found in 'Chapter 6: Discussing *Chalkle*'.

## Biography of *Chalkle*

Chalkle works by connecting, catalysing and strengthening local learning eco-systems – not replacing them. We are committed to building infrastructure for a better world of learning. (Chalkle, 2014)

The above quote as well as the figure below both capture the co-founders reasons for *Chalkle*'s existence. They believed the ACE sector in Aotearoa, New Zealand would benefit from stronger community connections and new ways of promoting classes to a wider audience in order to connect more people who wanted to teach with people who wanted to learn: "The intention was to supplement, rather than replace, the current education system of schools, universities and traditional community classes, and also strengthen the community at the grassroots level" (Packer, 2013). Their solution involved technology as the infrastructure (i.e. using the internet and online technologies): "Technology holds the responsibility to steward culture and nowhere is this more important than in the education space, around teaching and learning. We have named this challenge, and this inspiration, "The Learning Renaissance"" (Cabraal, 2014). The slide in Figure 1 was presented by *Chalkle* at the Edtech Conference in Wellington in April 2014:



**Figure 1.** (edtech for export, 2014) captures *Chalkle*'s mission as presented during the 2014 edtech conference (source: [www.edtechforexport.co.nz/wp-content/uploads/2014/04/Chalkle-EdTech-conf.pdf](http://www.edtechforexport.co.nz/wp-content/uploads/2014/04/Chalkle-EdTech-conf.pdf)).

From its inception, *Chalkle* connected with the national adult and community education organisation, ACE Aotearoa, and sparked interest not only in the ACE sector but in the business and social enterprise, and community development sectors as well. *Chalkle* featured in newsletters (e.g., ACE Aotearoa Spring 2012; Winter 2013; Spring 2014; and Winter 2015), blogs (e.g., Education Personnel, Green Ideas), as well as other media outlets (e.g., Radio New Zealand, Stuff.co.nz, Dominion Post). The organisation and its co-founders also received recognition through awards related to adult and community education (i.e., *Chalkle's Dynamic Community Learning Award*, 2012) and business, community development and innovation (i.e., the co-founder/s' *Absolutely Positive Wellingtonians Award*, 2013; *Women of Influence Award* Finalist, 2013; and *Chalkle* being a *NZI Sustainable Business Network Awards* Finalist, 2013).

The next section covers the three major influences on *Chalkle's* genesis: the ACE sector funding cuts, the Enspiral Network, and Meetup. These are followed by a detailed description of the organisation's transformation within the timeframe of this case study, and outlined in three main phases. A discussion of *Chalkle's* funding model and its partnership with the Enspiral Network will ensue.

## **The Influences on *Chalkle's* Genesis: ACE Funding, Enspiral, and Meetup**

My interviews with the co-founders revealed that *Chalkle's* genesis had three major influences which played a part in explaining how the organisation came into existence. The first genesis influence was the government funding cuts to adult and community education in 2009-2010, and how these cuts left a gap which the *Chalkle* co-founders believed the organisation could fill:

I think it (the funding) was pulled in 2009, we (the ACE sector) started to feel the consequences of that in 2010-11, and *Chalkle* was started in 2012. So I think there's definitely a flow-on from that. And throughout 2013, as I started getting more into the space, I started to realise more and more that there was a space here. It wasn't started because of that, it was more started as a consequence of that. (Co-founder 1)

The second influence was related to the Enspiral Network. The Enspiral Network is a group of entrepreneurs/activists, based in a coworking space in downtown Wellington New Zealand, who collaborate on (mostly) tech ventures for social impact (social enterprises): "The whole goal of Enspiral is more people working on stuff that matters. We're working together as a collective and as a community on social change" (Co-founder 1). Using predominantly online technologies, the Enspiral Network ventures employ collaborative decision-making and co-budgeting techniques, and share the work amongst the members. Since *Chalkle*'s inception, Enspiral has been instrumental in shaping the different phases of the social enterprise. This is how one of the co-founders described the influence of Enspiral on starting *Chalkle* (the Enspiral Network and its partnership with *Chalkle* will be described in greater detail in a later section):

As an organisation that was interested in new forms of professional development, I arrived in Enspiral and wanted to start to teach and learn from everyone. So even before *Chalkle* was an idea, I started going: 'oh what about we pull this person into the boardroom and this person into the boardroom', and I started organising classes. (Co-founder 1)

Finally, the third influence was Meetup, a social networking site which facilitates organising local offline group meetings (called 'meetups') based on common interests. The co-founders believed that there was an appetite in Wellington for stronger connections in the adult and community education sector, and the Meetup site was an already existing solution for enabling this connectivity through online technologies.

## **Chronological Framework: Phases of *Chalkle***

*Chalkle* was originally developed in June 2012 during conversations over cups of coffee between the two original co-founders, Silvia Zuur and Linc Gasking (Packer, 2013). Both were involved with the Enspiral Network and were interested in finding ways to enhance community education offerings in Wellington at the 'grassroots' level (as a way to supplement what was already



being offered in the ACE sector). *Chalkle* being a business startup (operating in the ACE sector) inevitably led to rapid transformations during the period from July 2012 (when the organisation was launched on Meetup) to December 2015 (the end of data collection for this case study). More changes were anticipated and have taken place since then, though these are outside the scope of this case study.

The enduring aspiration driving *Chalkle* has been its focus on having a positive impact on the ACE sector in Aotearoa, New Zealand, alongside the belief that technology can serve as an enabler for achieving greater connectivity, collaboration, and delivering community-led educational opportunities. The different 'phases' of the organisation have been identified through changes in the focus from developing community programmes and resources to a focus on developing the technology infrastructure to support community programmes and resources. I now describe the three phases which I have labelled: 1) Meetup; 2) chalkle.com; and 3) Enspiral Academy.

**Phase 1: Meetup.** The Meetup phase signals the initial period when *Chalkle* was operating as a provider of community education classes, using the Meetup online platform to host their organisation's page ([www.meetup.com/sixdegrees](http://www.meetup.com/sixdegrees)). Meetup is used in over 170 countries worldwide ([www.meetup.com](http://www.meetup.com)) is free to join and open to everyone. Meetup users can search online for interest groups to join in their local community, or they can start an interest group which other users can join. In this phase, the *Chalkle* group hosted on Meetup focused on organising community education classes which enabled social connections and were fun: "You have the social element, the 'try before you buy'; there's no long-term commitment, there's curiosity, and fun, and to some degree, mental stimulation" (Packer, 2013). *Chalkle* was launched on the Meetup site in July 2012 and in late August, the group had more than 400 members (the co-founders referred to their members as '*Chalklers*'). By mid-2013, the company had organised more than 600 classes, counted more than 1,600 registered *Chalklers*, and had accommodated the teaching and learning aspirations of more than 4,000 attendees (Chalkle,

2014). Other Meetup groups in Wellington include: Adventure Wellington, Wellington Foodies, Edtech Wellington Meetup, and hundreds more; membership ranges from fewer than ten to thousands of members in a particular group. *Chalklers* could signal to the organisation the topics of the classes they were interested in by posting suggestions for topics on the group's page; *Chalkle* would also survey the *Chalklers* with ideas for classes and when there was enough interest in a topic, the co-founders would find someone to teach a class on that particular topic. The teachers were often people the *Chalkle* co-founders already knew (e.g., other Enspiral members were invited to teach classes) or were approached by the co-founders to teach classes based on their knowledge and expertise on the various topics. The teachers would set the price for the classes; these were often free or the price would cover the cost of materials (e.g., ingredients for a cooking class). The teachers were therefore often donating their teaching time (volunteers). Activities organised by Meetup groups are run by volunteers and costs are usually to cover materials or the fees of the activities themselves (e.g., Wellington Foodies members will pay for the price of food and drinks consumed as part of an activity). The co-founders had direct interactions with *Chalklers* and teachers and they (*Chalkle*) were responsible for the content of the courses delivered as they were the organisers.

In the first two years, it was evident that *Chalkle* was establishing a presence in the wider ACE community. In early 2014, the organisation took part in the ACE Aotearoa project on 'Standards Setting' and featured in the discussion paper on Standards Setting for ACE (ACE Aotearoa, 2014). The organisation also requested feedback from their *Chalklers* by organising two surveys during this period (August 2012 and December 2013).

The rapid growth in membership, combined with a business model that was demand-driven meant that expansion would be very resource intensive for *Chalkle*. Scalability became an issue and so did using the platform on Meetup: "I just started hitting my head with using Meetup and getting frustrated, I didn't want to build a huge organisation on Meetup, I did want to build our own one" (Co-founder 1). After organising so many classes, the co-founders

started exploring the possibility of building a platform of their own, drawing on their close connections with software developers working at the Enspiral Network. Their focus shifted to building the technology infrastructure in order to support other providers in organising and promoting classes.

**Phase 2: Chalkle.com.** In October 2014, *Chalkle* transitioned into an edtech company and launched their own version of an online platform. No longer active on the Meetup site, *Chalkle* started directing the online traffic to their new website address, chalkle.com. Essentially, the chalkle.com website was designed to take care of all the administration, promotion and payment tasks in order to allow teachers and community education providers to concentrate on running classes. The platform is described in greater detail in Appendix 1. During this phase, the social mission of the organisation remained the same; however, *Chalkle* was no longer acting as a provider of community education classes but instead wanted to support other providers by making it easy for them to promote and organise their own classes. The *Chalkle* co-founders believed the best way to help other ACE providers and have an impact on adult and community education was through a technology platform solution:

Yes, we're a software/technology driven business; but fundamentally, we are an organisation designed to create a positive impact on education. For us technology is an enabler, the medium, and a tool; technology is not the answer, but technology is part of the solution. (Cabraal, 2014).

The main relationships for *Chalkle* were with the provider administrators (people responsible for posting the classes on the website), instead of with the learners and teachers of the classes, which was another shift in their way of operating. Some of the first providers to join the site were the Horowhenua District Council (in Levin) as well as the Wellington Timebank (a local alternate economy organisation), who started organising community education classes when the chalkle.com platform was developed; other examples of providers who made use of the chalkle.com platform are

listed in Tables 4, 5, and 6. At the same time as launching the new website, *Chalkle* designed free online resources for providers on teaching effective classes and guides for using the chalkle.com platform. Although *Chalkle* didn't have direct contacts with learners, the platform was also designed with prospective learners in mind, allowing them to register on chalkle.com (at no cost) in order to find out about community education classes taking place in their local community. Every provider using the chalkle.com platform to organise and promote their classes had access to the same pool of learners.

Finally, another shift during the second phase in *Chalkle's* evolution was signalled by a change in the executive team: Linc Gasking left the management team to pursue other ideas for startups, mostly in the technology social enterprise space. Anthony Cabraal joined as one of the co-founders; Anthony had previous experience developing startups in the social enterprise space and was already involved with the Enspiral Network (he was also Silvia's flatmate at the time). Silvia and Anthony had been discussing *Chalkle's* transition from Meetup to its own technology platform and they decided to work together in order to make this happen.

### **Phase 3: Enspiral Academy (and *Always Be Learning*).**

The next phase in *Chalkle's* evolution involved a pause in regards to developing the software technology (though chalkle.com was still in use) and a return to community education programming and supporting providers in organising classes for their local communities. Indeed, although the co-founders were happy with the software product they had built, and there was still interest in using the platform from different providers, they came to the conclusion that throwing technology at a community and expecting them to use it was not enough to get the traction they needed to make *Chalkle* and its platform viable. By mid-2015, the Enspiral Academy was born as a new startup venture (social enterprise) of the Enspiral Network, providing mostly professional development classes for the IT sector as well as other classes and workshops open to the general public. The classes and workshops were run collaboratively by various members of the Enspiral Network, not just the

*Chalkle* co-founders. Enspiral Academy was considered an education provider (mostly in the professional development sector) which aimed to deliver programmes around entrepreneurship, social impact, and technology. This phase signalled a clear distinction between *Chalkle* ‘the technology player’ and Enspiral Academy ‘the education company’: as a provider, Enspiral Academy used the chalkle.com platform to list and organise their classes and workshops. One of the co-founders explained this distinction, below, in terms of the different skills required to tackle the same issue of connecting more teachers and learners:

In my mind they’re very different things (*Chalkle* and Enspiral Academy): we’re starting a technology company to solve a problem and starting an education company to solve a problem. And the technology company has a different core skill set that’s required. It needs people to be able to think really carefully and clearly about what other tools are already out there: how do we interact with things like Facebook and Twitter to be able to see where people already are on the internet, connect them with classes, and help them find things that they want to learn; create almost demand-led: ‘here I am and this is what I want to learn, what’s near me and how can I find it?’, and which teachers can engage with. Which is really different thinking to setting up classes and running them efficiently and effectively. And we’ve gone for the latter with Enspiral Academy right now because that’s what we know. (Co-founder 2)

The co-founder goes on to talk about how they plan to keep the software product, chalkle.com, alive by growing the education venture Enspiral Academy:

I think if Enspiral Academy keeps growing and working we should be able to support pretty well as a software product, and if we can do that then we can do lots of interesting things. And as we keep *Chalkle* alive and growing, we may recruit more people in or build a new team around that technology-based stuff, which is a very different beast [from Enspiral Academy]. And we’re pretty open about that stuff at the moment, in terms of how much of a technology company it is and how much of an education company it is. (Co-founder 2)

Part of the offerings in Enspiral Academy involved a programme called the *Always Be Learning* (ABL) programme, an initiative designed to collaborate with and support local *Champions* to run financially accessible classes and courses in their community. This programme was supported by *Chalkle* as well as funding from UNESCO working with people who were already active in their local community:

The initial model was based on the idea of a community champion, and it was someone who was empowered with the technology tools and the cultural tools to be able to go into a community and find teachers and organise classes and put them up on a website and connect them with the right audience. [...] If I think about how we can improve the ACE sector in New Zealand, this is basically our answer to that, and that was to resource four people in four very different markets, who are working in organisations that either already have a community or are growing a community, and/or they're already doing education opportunities. (Co-founder 2)

*Chalkle* advertised the *Champion* roles online on [chalkle.com](http://chalkle.com) as well as [dogoodjobs.co.nz](http://dogoodjobs.co.nz). The four local *Champions* selected included representatives from four communities (Auckland, Palmerston North, Levin, and Christchurch) with very different offerings in terms of community education classes: a 3D printing organisation in Christchurch, the Young Innovators Collective in Auckland, a community council organisation in Palmerston North, and Te Takere Library in Levin. The *Champions* used the [chalkle.com](http://chalkle.com) platform to organise and promote their classes and would encourage local providers in their networks to use the platform as well. The ABL programme started with a training session in Wellington for the four *Champions*: *Chalkle* trained them on using the technology tools and shared processes to be able to map their communities, identify where the opportunities were and plan community education programmes based on the needs of their communities. The programme was focused on collaboration (co-budgeting and co-decision-making) and also included twelve hours per week of resource time (mentoring from *Chalkle*) over a three month period:

We connected them together, so with digital tools, to give them a space to share resources and learning and kind of stay together as a crew. And we used basic Agile software processes to keep people working together, and we did monthly check ins with a programme manager, and we also gave them money to spend on whatever they thought was most important, so they did a collaborative budgeting project where every month we would put some money into the pot and they would decide together how they wanted to spend that money based on what their shared challenges were. So basically we created a collaborative programme where they worked together and they were able to share resources. (Co-founder 2)

The ABL ran over three months in 2015 but was not repeated after the first cohort of *Champions* completed the programme. When the funding from UNESCO ran out, it was a challenge for *Chalkle* and Enspiral Academy to keep the programme running:

Yeah, we did push that out into market to see if people would be willing to pay to be part of the programme, but we pulled that in the end, we just thought that it didn't quite fit. And there weren't enough organisations that would pay to get their staff involved. So we're exploring other ideas, if and how we could do something like this. (Co-founder 2)

The Enspiral Academy was going to be reviewed in early 2016 to determine future scope and direction. Tables 4, 5, and 6 below summarise the three chronological phases of *Chalkle* as described above. The following sections address *Chalkle's* relationship with the Enspiral Network as well as the organisation's funding model.

Table 4. *Key Characteristics of Phase 1: Meetup.*

<b>Phase 1: Meetup</b>	<b>Details</b>
Dates:	Started: July 2012, Ended: October 2014
Location/s:	Wellington, and online
Tagline:	<i>Chalkle° six degrees of education</i>

Main service provided by <i>Chalkle</i> :	Provider of community education and responsible for organising classes based on the demand from its members ( <i>Chalklers</i> )
Examples of uptake:	While on Meetup, <i>Chalkle</i> organised close to 650 classes, focussing on fun and affordability, often free of charge, on a variety of topics (e.g., Crepe Making, Spanish in Context, Composting)
Relationship with users:	Direct interactions with teachers and learners. However, only registered members of Meetup can access the group (registration to Meetup and the <i>Chalkle</i> group was free)

Table 5. *Key Characteristics of Phase 2: chalkle.com.*

<b>Phase 2: chalkle.com</b>	<b>Details</b>
Dates:	Started: October 2014, Ongoing in 2016
Locations:	Various throughout NZ, and online
Tagline:	<i>Chalkle° Always be learning</i>
Main service provided:	Online platform helping with the organisation and promotion of classes offered by other providers ( <i>Chalkle</i> no longer considered a provider). Helping people who want to learn find out what's offered in their community
Examples of uptake:	By Dec 2015, chalkle.com had supported 203 different providers (e.g., Nelson Environment Centre, Wellington Timebank, Fresh Thinking, Spanish Corner); also, over 6,300 learners took classes (e.g., Beginners Bee-keeping, CVs and cover letters, Fiddle Workshop)
Relationship with users:	Direct interactions with provider admins; very limited interactions with learners and teachers. Online platform accessible to everyone visiting the website (free to join as a provider and as a learner)

Table 6. *Key Characteristics of Phase 3: Enspiral Academy (Always Be Learning).*

<b>Phase 3: Enspiral Academy (EA) and Always Be Learning (ABL)</b>	<b>Details</b>
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Dates:	Started: May 2015, Ended: September 2015 (ABL); Ongoing in 2016 (EA)
Locations::	EA: Various locations in NZ; ABL: Auckland, Palmerston North, Levin, Christchurch (and Wellington)
Tagline:	<i>Find a class near you;</i> and <i>Build a learning business on Chalkle</i>
Main service provided:	EA: Online platform helping the Enspiral Academy (provider) organise events, promote classes, and take payments. ABL: Resourcing local ‘Champions’ in different communities to organise their own community education classes
Examples of uptake:	EA: offered industry-led classes focused on developing entrepreneurship skills, social impact, and teaching skills around tech literacy and media literacy, e.g., <i>Tech for NonTech</i> and other workshops such as Climathon. ABL: organised training sessions for Champions (in Wellington) and ongoing remote mentoring. Featured a decentralised approach, ABL focused on needs of local communities and collaborative decision-making and co-budgeting between the four local Champions and <i>Chalkle</i>
Relationship with users:	Direct interactions with EA admins and four local Champions (ABL); but not the teachers and learners. Platform (chalkle.com) used by EA and by ABL local Champions (as well as their respective learners and teachers). EA and <i>Chalkle</i> associated with the Enspiral Network (ABL being a programme run by EA)

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## The Enspiral Network

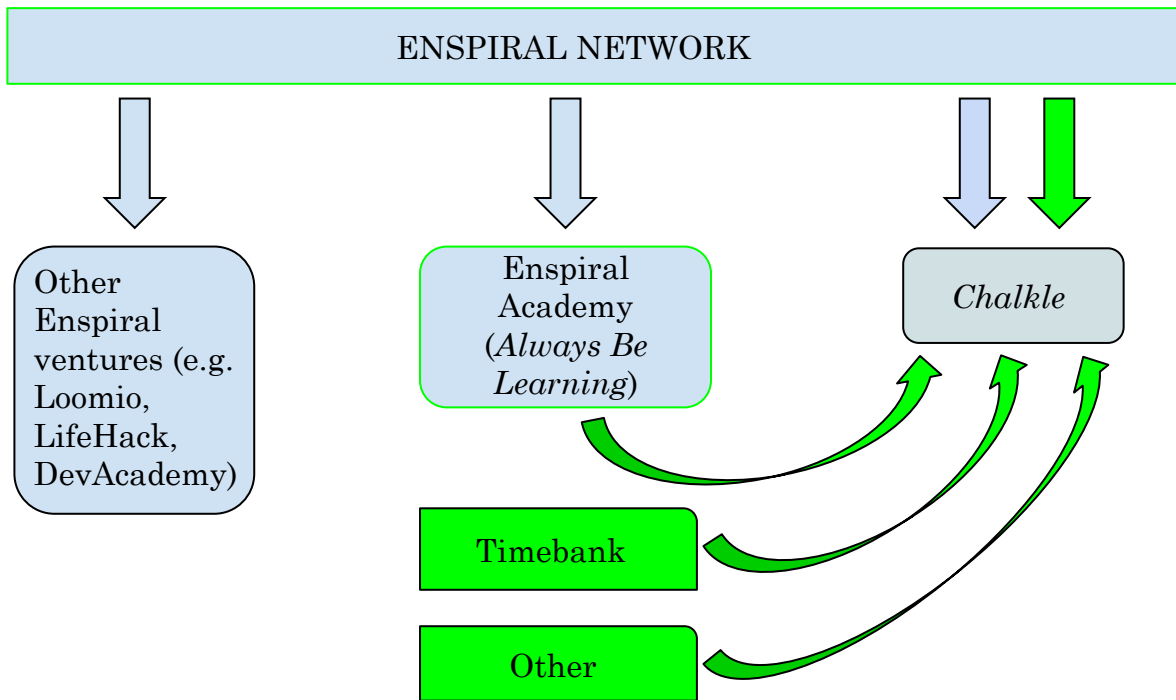
As mentioned previously, the Enspiral Network has been a key collaborator through the various iterations of *Chalkle*. This section focuses on describing the Enspiral Network and its relationship with *Chalkle*, one of its startup ventures. Three main components make up Enspiral: the Enspiral Foundation, service companies, and startup ventures (*Chalkle*, Loomio, Dev Academy, and more). People can engage with the Enspiral Network at different levels, as explained in the ‘What is Enspiral’ video (<https://vimeo.com/125088390>):

*Friends of the Network* are the most common and represent a wide and varied network of supporters; *Collaborators* count roughly 300 individuals participating in collective decision-making, proposing projects for collaborative funding, and working for Enspiral ventures; and *Foundation Members*, which represents individuals who steward the culture and social mission of Enspiral, and collectively own the Foundation. Finally, four Foundation Members are also on the Board of Directors.

In a first instance, the Enspiral-*Chalkle* relationship was one based on social connections: the co-founders were all members of Enspiral, and other members were teachers and/or learners for *Chalkle*. The relationship was also built around technology development: various members of Enspiral contributed their skills to developing the online platform chalkle.com, testing it and making sure it was working for the providers. Subsequently, Enspiral became a provider of community education classes, and used *Chalkle* to manage their course offerings as well as a tool for organising meetings and training for Enspiral members. One of the co-founders had this to say about the *Chalkle*-Enspiral relationship:

Our business is part of the Enspiral co-working space, which is also home to startups like Loomio that are starting to gain some global attention for leading the way in technology that fosters an open, sharing, and collaborative culture. So I think New Zealand is really well placed to embrace technology and build businesses that can change our culture and create a more open world. (Sykes, 2015).

Figure 2 on the next page illustrates the *Chalkle*-Enspiral relationship at the end of 2015, when the data collection for this study ended. It depicts the Enspiral Network as an umbrella organisation for a number of social enterprises based in Wellington, such as *Chalkle*. It shows how the Enspiral Network and the Enspiral Academy were both providers of ACE classes and workshops (mostly related to professional development) using the chalkle.com platform to organise and advertise their classes:



**Figure 2.** (2016) illustrates the relationship between *Chalkle* and the Enspiral Network at the end of the data collection period for this case study (December 2015).

## ***Chalkle's Funding***

As a startup technology venture in the adult and community education space, funding has always been a central preoccupation for *Chalkle*, especially considering the 2009-2010 government funding cuts to the ACE sector were an important influence on the genesis of the organisation. One of the co-founders explained the importance for the organisation to find a business model able to withstand shifts in funding:

We are doing everything we can to design Chalkle as a strong, self-reliant business model so that it is as independent as possible, and resilient against shifts in funding. A core motivator for this is seeing how badly the adult education sector in NZ collapsed when the funding changed about five years ago and 90% of schools closed. (A. Cabraal, personal communication, March 30, 2016)

Nonetheless, funding was hard to come by and *Chalkle* survived through a drip feed of funding from various places: “In short funding is from

anywhere we can get it - and any time and extra profit we can invest!” (A. Cabraal, personal communication, March 30, 2016). Setting-up a class through chalkle.com was free; teachers set the price of the registration fee for the learners and *Chalkle* took \$2 from each registration. This revenue from learners represented a very small portion of the total revenues for *Chalkle*, which means that they had to draw funding from other sources. One of the sources was service and enterprise contracts: small contracts with the Department of Conservation and the Horowhenua Library, for example. Another source was sweat equity: *Chalkle*’s co-founders and employees did not get paid in 2015; they volunteered their time to developing the business. Friends and family debt funding was another source: *Chalkle* had raised \$50,000 in debt to build the product to where it got to when the data collection ended. Funds were also raised through investment from other business units: the co-founders worked within the Enspiral Network on other ventures and used some of the profit margin from the consulting work to reinvest back into *Chalkle*. Finally, the company received grants and support for associated work: over the past few years, *Chalkle* received a community grant from the Wellington City Council (\$12,000) as well as from UNESCO (\$19,800) to run *Always Be Learning*. The grants support was used to run classes and train people to run classes, rather than support the core of the business (the technology).

In terms of expenses, the money raised went towards two main items: people and basic startup expenses. The people costs were paying people for their time building the software platform (chalkle.com), and building software can be particularly expensive. However, this work was essential to the chalkle.com strategy, which would only be successful by building technology that would enable other providers to make money from their classes. Basic startup expenses included business administration tools, software tools, legals, and other general business expenses.

In terms of government funding of ACE, one of the co-founders shared their opinion of what needed to be funded; in particular accessibility, so that

people from different socio-economic backgrounds can all reap the social benefits of community education:

I can agree that the taxpayer perhaps shouldn't pay for Moroccan cooking, but if you only see the Moroccan cooking, you're missing the social benefits that happen through face to face classes. And if you only leave it to user-pays, then the person in Newtown or Naenae can't afford it, so therefore that's accessibility. (Co-founder 1)

The co-founder went on to talk about the need for innovation in the ACE sector and for keeping up with the technology wave:

And then innovation, different ways of teaching that keep up with the technology wave. It's moving into the education space and central government needs to be funding *that* (emphasis added) so that we're able to offer innovation in the ACE sector; cause I don't see it offered at the moment. (Co-founder 1)

This chapter covered the context of this case study, a description of *Chalkle* and its evolution between July 2012 and December 2015. It also described the role of the Enspiral Network as well as *Chalkle's* funding model. The next chapter presents and discusses findings which emerged from the individual interviews related to the research questions: the motivations of learners, teachers, providers, champions, and the co-founders participating in ACE and engaging with *Chalkle*; and the aspirations, challenges, and opportunities for the future of ACE and of *Chalkle*.



## Chapter 5: Findings – Key Themes

In addition to the co-founders, three learners, two providers, two teachers, and one Champion were interviewed. As a group, these participants were highly educated, relatively young (all but one were under 35 years of age) and the majority were women (two of the ten interview participants were men). The first theme will explore these interview participants' motivations for their engagement with ACE and *Chalkle*. The topics covered in this theme include experience with ACE (formal, informal, non-formal, alternative education), as well as the value they place on education. It will also describe motivations for engaging with *Chalkle* and participants' views on social causes and activism. The list of interview participants can be found in Appendix 2 (and Table 2 in the Methods chapter).

### **Theme 1: Motivations for Engaging with ACE and *Chalkle***

**Experience with formal, non-formal and informal education.** All participants had a degree from a tertiary education institution: polytechnic, university, or an alternative formal tertiary education programme (the alternative programmes will be described when relevant to the findings below). All had also participated in community education classes in varying degrees: some had attended many different classes offered by various providers, while others just a few; participation was either as a learner, a teacher, or both. An interesting point in common with all of the interview participants is that each individual had some form of teaching experience: formal teaching contexts (co-founders 1 and 2; teacher 2; provider 1; and learner 2), and non-formal/informal contexts (learners 1 and 3; teacher 1; provider 2; and champion 1).

In terms of ACE classes, training sessions and workshops attended or taught by the interview participants, there were similarities between the classes advertised through *Chalkle*, both when the organisation was hosted on Meetup as well as on the chalkle.com platform, and the classes not advertised by *Chalkle*. The most common classes (not advertised by *Chalkle*) attended by the participants were: language learning, skills-based (e.g., sewing, gardening, drawing), professional development classes and training modules, and fitness classes (e.g., yoga, Pilates, acrobatics). Two participants had taught ACE classes (not advertised by *Chalkle*): languages, dance, professional development (e.g., group facilitation), and cooking. The classes advertised by *Chalkle* (Meetup or chalkle.com) which interview participants attended were similar to the ones not advertised by the organisation: languages, music, skills-based (e.g., computer coding), and professional development. Again, it was the same for classes taught by some of the participants and advertised by *Chalkle*: cooking, languages, professional development, and skills-based (e.g., making your own beauty products). An important feature of the chalkle.com platform is that it was also used by the Enspirational Network as a booking system for their meetings and training sessions, so it was not just for other providers to organise and promote ACE classes.

A few of the participants talked about how their experience of formal education influenced what they thought of and expected from community education as well as alternative forms of education. One of the learners described how her experience of formal tertiary education influenced her expectations of community education in regards to quality and learning outcomes:

I think it has an impact on my expectations. I want community education to be of good quality, of a high quality, because my own formal/paid education was of a high quality. So I have quite high expectations. It doesn't have to be amazing, but I expect to learn something. And I expect that upfront I'm told what I'm going to learn and that be met. (Learner 3)

Three of the interview participants had been involved in alternative education as learners, teachers, and/or providers. Two of the participants were



involved in teaching in alternative programmes (though they referred to their role as ‘learning advisors’): one in an alternative high school in New Zealand and the other in a tertiary education programme overseas. The third participant was involved as both a former student in an international alternative tertiary education programme, and was at the time of the interview the coordinator of an alternative tertiary education programme which used the chalkle.com platform to organise their classes. She described her experience as a student as part of a ‘formal alternative tertiary education programme’ because there was a curriculum, the organisation was well-established, and she received a diploma after completing the programme. She described the New Zealand programme she was coordinating as located outside formal education because the structure was flexible (i.e., the curriculum was co-designed by the students), some of the classes were open to the community (and advertised through *Chalkle*), and the students didn’t receive a diploma at the end. Both the overseas programme and the New Zealand programme were residential. This participant had completed a year of university study in New Zealand prior to enrolling in the alternative education programme overseas. She believed that alternative education was more successful than formal tertiary education at offering a diversity of content, combining different forms of learning, which she referred to as ‘lifewide’ learning and learning outside of the classroom, and connecting students with communities:

There’s something in that specifying (formal tertiary education) that I felt like actually I’m missing out on how this is connected to everything else, like it’s isolated. And that’s what attracted me to the (alternative) programme, was that it was so integrated. It was both diverse in content and holistic in that sense, and yet it was also a combination of intellect and hands-on learning, and connecting with the local community, and connecting with other communities, and working on various projects. And it recognised that fact that learning isn’t just going to happen in that two hour block. (Provider 2)

She also talked about how the alternative programme was enabling her to connect the learning to tangible results, compared with her university studies:

And I think maybe in (the alternative programme), there was more opportunity for me to creatively implement my learning in the world. Whereas in university and my degree, it was: absorb a lot of knowledge, and churn out essays, and digest that intellectually; but it wasn't actually grounding into projects or into real-life work. (Provider 2)

One of the learners described the format of a class she attended which was organised by *Chalkle* when they were still hosted on Meetup. The 'class' was organised like a club meeting, had a flexible 'drop-in' format, and participants were using self-directed learning and peer-learning to learn a coding language:

I went to some of the 'code yoga' classes. So it was almost like a regular club thing, where you'd work through online activities learning Ruby: so using existing websites that you could do by yourself, but it was in a group environment, you could sit next to someone at a similar level and sort of peer-learn. And then they had someone running the session as a mentor that would come around and help if you didn't understand a programming concept or something like that. That was really cool. So it was sort of like a combination between a club; because it was quite unstructured I guess, definitely informal, just drop in if you felt like coming. (Learner 1)

The learner added that she appreciated that *Chalkle* offered so many different types of classes (variety of topics and teaching methods):

I guess it's a bit different to some of the sorts of classes they (*Chalkle*) do now; I like that it's all different, I think it's really exciting. (Learner 1)

Another participant described how informal learning opportunities occur on a regular basis in their workplace, and what the format of that learning looks like:

What does education look like, looking at (where I work) and looking at how we've educated ourselves: sometimes that's bringing in an expert, sometimes

it's us having a meeting where we unpack some painful interaction or conflict. Sometimes, it can be somebody teaching (a colleague) how to do an empathy interview; six months later, (that colleague) teaches me how to do an empathy interview, and then I teach you how to do it. (Teacher 2)

Teacher 2 also talked about passing the knowledge learned onto someone else and it spreading through the community in order to benefit more people. He made the distinction with community education in that these informal learning opportunities are happening on a different time scale, as opposed to a class format which is set to a specific time and place. He also talked about the relevance of this type of learning being bound to the time and context in which it is taking place:

So it's this chain, and I can think of each of these cases where there's a skill and a knowledge that spreading through our community. But it might not look like (community education) because it's on a slightly different time scale and it happened when it was needed. (Teacher 2)

**Value placed on non-formal, informal and formal education.** All the participants placed a high value on all forms of

education. Some of them refer to learning as being part of their identity:

I just value every type of learning, that's just who I am I think. [...] I like formal study; I like informal study; I loved uni; I like popping into things; even just meeting people and asking them questions and finding out about what they do and how they do it. (Learner 1)

Learner 3 talked about education being an important vehicle for personal growth and development:

I value education extremely highly, and I think we should all be striving to better ourselves and better our minds, and try things where we're interested. (Learner 3)

In terms of learning preferences, one of the teachers mentioned the importance related to the social aspects of learning, especially for sociable people like herself:

I'm a very social person because I like to be in contact with people and learn through them rather than through the TV. [...] also online, I never learn online [...] No, I prefer to go to someone and ask. (Teacher 1)

The teacher would often do an exchange of services, she would teach someone Spanish in exchange for getting a massage. She was a member of Timebank, which is a system based on the exchange of skills:

And also I do exchanges, like massage, I very often need massage; so I teach, I do an exchange for a Spanish class, or whatever. (Teacher 1)

Teacher 2 talked about the benefits of community education, including adding breadth to people's lives, opportunities for adults to extend their skills and exploring different things, and a place to connect with others:

I had direct experience doing live drawing classes, at (some) Community College, and that was a lot of the foundation of how I came to be at arts school; because I just learned a lot. And it's really good mental health stuff, I think there's a connection there in terms of people having some breadth to their life. So I think learning, and education, is important on multiple fronts. One of them is finding a place to connect to people, and there's also definitely something which is expressive as well.

Some of the participants mentioned formal, informal and non-formal education complementing each other. The participant below talked about how life can be richer if you take advantage of different learning opportunities:

I think having both (formal and informal) is a good complement. This is why I like travelling, the more experiences you have, the richer you are. So if you went only to university, you'd miss a big part of life; and if you had only social education because you've never had high level studies, you'd also miss a part of life. (Teacher 1)

One of the providers expressed her thoughts on what formal education might be lacking, and she believed it would be important to find a middle ground between formal tertiary education and community education methods of teaching. She thought community education was more aligned to how people 'learn best':

I think that they're really different [formal and community education] and I wonder why there's such a gap between them, you know between the way that people are taught and the way people learn in those different situations. And if there's more middle ground in what we can learn from each of the different situations. Part of my frustration at tertiary education could come from being involved in informal education, could come from learning in so many different ways and then coming into this real structured environment, where it seems to be less about the individual and more about this knowledge and this way of doing things. And so, I think there's a lot that we could learn from these community education-based methods. (Provider 1)

Provider 2 talked about the expectations associated with having a university degree and how these expectations did not correspond to what she really wanted to be learning:

There are so many expectations around having a degree, it's like you need to get your degree so you can be an able human being, be valued. It was quite expectations driven, for me, rather than really true to what I wanted to be learning and creating. (Provider 2)

She went on to talk about how she finds community education to be more relevant and flexible in offering topics that can have a direct impact on the learner:

I'm just thinking back now to the earlier question of why community classes, why they interest me so much, and it's because they can be really relevant to what I'm working with in my daily life or in that time of my life. I don't need to choose things that aren't relevant and there's a direct impact. (Provider 2)

One of the learners working with preschool children talked about the importance of building relationships and getting the community involved in education; this is why she valued community education:

My view on education, especially at that age, is a lot about building relationships, and so that's why the whole community education thing sits quite well with me. As teachers, we're building relationships with those children and their family, and that's how you get the best out of education. And we take our children out into the community to meet different people; we believe in taking our children places. I just think that's the way education should be. (Learner 2)

The concepts of lifelong learning and lifewide learning were discussed by many of the interview participants. One of the teachers linked the concept with work in social enterprises, and how learning and adapting are instrumental in their success:

Education and learning are the number one thing. I think everybody here (Enspiral) is into lifelong learning. If you're not learning, you're not adapting; and if you're not adapting, what are you doing? You're doing the same thing, it's boring; and if it's a social enterprise, you're just going to drive the thing into the ground, and nobody can afford to do that. It can't be decoupled. (Teacher 2)

The learner working with preschool children talked about the importance of instilling an interest in lifelong learning:

The whole philosophy for children of that age is that you want people to grow up to be curious, and interested, and lifelong learners. And you've got to see yourself in that position as well. That's my philosophy on life: we all need to keep on learning to grow. If you instil that right from the beginning, and everyone grows up believing that, there will be adults as old as nans who want to learn new things. (Learner 2)

Finally, one of the providers talked about the value of the learning that ensued from the residential aspect of the alternative tertiary education programme she coordinated. She linked the residential aspect of the

programme with the concept of lifelong learning (and lifewide learning), where students learned from and about each other:

We did consider at one point to make it non-residential (the alternative programme), but actually the residential aspect is where so much of the learning happens. The learning is beyond the classroom, and is a lifelong journey, and learning is how I am in relationship to all these other people, and it's all these soft skills that are lost in conventional education. You go to university and you don't have to deal with people beyond that one hour lecture or two hour lecture. And actually, having to cook everyday with people, and share a space with them, and show up for each other, and support each other, and embrace each other, and deal with conflict together; there's huge learning in all of that that we don't actually get exposure to in our current culture. (Provider 2)

**Value of *Chalkle* on the ACE scene.** Interview participants talked about how *Chalkle* is useful in terms of learning for the individual and for society. One of the co-founders mentioned how *Chalkle* was designed to respond to a need for more people to be able to teach and learn within their community:

The reasons why we thought it was a good idea and that it was needed, and I think these are still the reasons for continuing the project today, is lowering the barriers to entry for more people to be able to teach the skills that they have in their heads to more people in their communities. And to create a space where as a learner, you can go to find interesting things to learn from people around you in one place. That's probably more of the bigger picture 'why'; there's a whole bunch of things underneath that around there are not the channels available at the moment to learn the things that we need to learn, as individuals and as a society, to progress. (Co-founder 2)

Another co-founder talked about how *Chalkle* aimed to use technology to support providers with the administration and promotion of classes, and to fill a gap between school-based ACE and online courses/Massive Open Online Courses (MOOCs):

The initial thought of *Chalkle* as the platform was that many of the ACE organisations crumbled for two reasons. One was administration: organising classes without decent software is really hard work. There's a lot of admin that's involved: RSVP management, payment reconciling, and all of that sort of stuff. And second was marketing: so yes you do all this admin, but how do you get your word out there? So on that very practical level, we thought that was what the tech platform was wanting to solve. I think the other reason is, if I look at other new forms of education, there's not much in that space. You've got the institutions, you've got the online stuff, but it just felt like there was a void between MOOCs and online stuff, and 3-4-5,000 educational institutions...and I couldn't see much in the middle. And so *Chalkle* is trying to play in that middle space. (Co-founder 1)

Some of the teachers and providers mentioned being frustrated with other event management and booking systems. They talked about how *Chalkle* made it easier for them to organise classes, and how it had been designed to respond to their specific needs as an organisation:

The good point is that they are quite flexible, and you can choose how much support you want to have. Or you can just manage the whole thing; this is the good point of comparing probably with other websites. [...] *Chalkle* I think is more open. (Teacher 1)

Teacher 2 who works at Enspiral had looked through different options and trialled other systems before deciding to use chalkle.com as the network's main booking system. The decision was in part influenced by values and in part by the technology. *Chalkle* had made some changes to the platform in order to fit Enspiral's requirements:

Recently we've moved it (*Chalkle*) into being Enspiral's primary event system. So the idea was that, we tried Google Plus for a while but nobody was really there; we could have gone with Facebook but it didn't seem values aligned, being super dependent on Facebook. So there's a little bit of work done to meet the needs of the network (Enspiral). Some people came together and said: '*Chalkle* would be great if it could do also A, B and C'; and so they had that built, and now it's our primary thing. (Teacher 2)



He went on to talk about how *Chalkle* enabled a network-magnifying effect, lowered the barrier for collaboration, and made it easier for informal learning opportunities to benefit more people thanks to its flexibility and agility to be responsive. He gave this example:

Say I mention Agile and you say: 'I don't know what that is', and I say 'I can give you a demo'; it's to pause at that point and go: 'Would anyone else benefit from this?' We could do this right now, or we could do this next Wednesday, and I could just put an event up on *Chalkle* and say: 'Hey friends, does anyone else want to come to this thing?' What you're doing is more effective because you've been able to share it and spread whatever you've learned a little bit more. I like looking for that sort of opportunity and I think that's what *Chalkle* helps make easier. One of the core concepts I remember from early on, that step when I say: 'Hey wait, we can do this next Wednesday and do you want to organise snacks and book a room and get some people together?', one of *Chalkle's* theories was that that bit was the bit that breaks down. It's too hard, because as soon as you involve money, or booking, it's just easy to say: 'No, let's just do it now or not at all'. So I think that's what's interesting about *Chalkle*: it's trying to lower that barrier for collaboration and for community learning, or learning that's more than just one-to-one. (Teacher 2)

One of the providers talked about how *Chalkle* made it possible to start organising community education classes, which the provider had not done previously. This decision was based on the ease of organising classes which the platform provided, as well as the opportunity to collaborate with 'like-minded community-led organisations':

I think Timebank and *Chalkle* have been trying to do things together for quite a while. They're all community-led initiatives that started around the same time. And so there was a real interest in how they can work together. And we thought: 'Timebank is about sharing skills, so can these people share skills as classes?' And now we're trying to run these classes and workshops as fundraisers for Timebank because we need to be raising a certain amount of funds. So it's that fundraising aspect, but it's also that we want to be connecting our skills with the community. And I think we like the idea of *Chalkle* being a way that makes it easy to organise and a way that we can

reach more people as well. And supporting another like-minded organisation.  
(Provider 1)

It was a similar effect for the champion who took part in the *Always Be Learning* programme. She talked about *Chalkle* providing the support needed to get things off the ground in her community. She saw the benefits of what that support could do for other people and other projects:

To a large extent, I wouldn't have really gone out and just done it. While you have ideas in your head, you need an excuse, someone to actually kick you into gear. And also, actually having someone do the coaching in the background, from *Chalkle*; having that support is actually really helpful, and it's to a large extent the inspiration. That works with someone who's so risk-averse as I am and has these ideas but has a terrible history of actually implementing them. Then imagine what it would do for other people; to put those sorts of things in place and just see what happens. (Champion 1)

**Social causes and activism.** Before discussing the findings related to interview participants' involvement in social causes and activism, it is interesting to note the importance of social networks for *Chalkle*. All but one of the interview participants first learned about the company through their social networks or personal contacts: either one or more of their friends, family members, or colleagues were involved with *Chalkle* in some capacity. The only participant who didn't learn about *Chalkle* through a personal contact said that she arrived in Wellington from a region and didn't know anyone; she then registered to Meetup in order to meet people in Wellington and get involved. She first came across *Chalkle* on the Meetup site (which is a social networking site).

Though most were reluctant to call themselves 'activists', those interviewed were interested in and/or involved in social causes. They saw *Chalkle* as playing a role in facilitating 'social activism'. A quote from one of the co-founders illustrated this well and observed the importance of social networks facilitated through *Chalkle*:

So part of the work right now with Enspiral Academy (education provider) is to think about it as its own community and its own social movement: there are people who are attracted by education technology and social impact. And then I see *Chalkle* as the same sort of software infrastructure for growing those types of movements. So if I think big picture: you've got pods of teachers that are working together and supporting each other, and they belong to a community where learners are learning from them, and they're also part of the *Chalkle* network which anyone can join. It's all part of this connected group of people that are learning and teaching off each other. (Co-founder 2)

One of the teachers discussed how *Chalkle* attracted socially-minded people, and how the organisation seems to align with their values around learning 'outside of the traditional classroom', sharing, and social causes:

A lot of teachers, because I know them of course, we are very social people as well, so that's why we teach in *Chalkle* instead of in a classroom. We are all into learning, sharing, and this kind of people are also socially concerned people. (Teacher 1)

One of the learners in the study, who was very reluctant to call herself an 'activist', talked about the importance of supporting the community as the core of the philosophy when teaching children:

Because of where I work and the philosophy of our (Early Childhood) centre: we believe in supporting local community, we believe in using our parents as a resource. Like if we need a plumber, we would use a plumber that we would have as one of our parents; because you want your community to support you as a centre so you need to support your community. I believe in all that sort of stuff because otherwise I wouldn't work there. We all believe it quite strongly. (Learner 2)

Finally, although most participants valued *Chalkle's* social ambitions, one participant was skeptical about whether or not these aligned with the values of the learners and the teachers using the platform. She believed learners (and possibly teachers) were using the platform because it was convenient for them or because it was listing a class they were interested in;

not necessarily because it aligned with their social ambitions or philosophical views:

The idea of everyone being able to teach and everyone being able to learn, it's taking education out of the hands of big education providers and putting it back in the hands of the community. But that said, it's completely up to the community how they want to use it (the platform). I see it more as a tool to be used in whatever way people want to use it. There can be all these big ideas behind something, and I think *Chalkle* did want to see it as a social change enterprise, but I don't know if that necessarily comes across in the way that things happen. For most people it could just be about: 'Hey I want to take an interesting class, meet people, get out of the house, try something new...' and that's all there is to it. I can see both of these perspectives, because I've worked on the bigger picture stuff with *Chalkle*; but then also being involved at the community level, people don't necessarily come to our classes because of any social or political reasons. (Provider 1)

## **Theme 2: ACE and *Chalkle* – Aspirations, Challenges, and Opportunities**

This theme will cover the interview participants' opinions about the main challenges faced by ACE and *Chalkle*, as well as the aspirations and opportunities for what *Chalkle* referred to as the 'Renaissance of Learning' (Cabraal, 2014).

**ACE and *Chalkle*: funding challenges and other roadblocks.** Similarly to other ACE organisations, one of the major roadblocks for *Chalkle* was the lack of funding, which led to staff turnaround and other changes in the organisation. Other challenges mentioned during the interviews were associated with the nature of startups, scaling up a business, and issues with finding the right business model. *Chalkle*'s model was based on a 'double-sided marketplace' (an expression used by one of the co-founders): this meant that the organisation not only needed to attract learners (demand

side of the marketplace), they also needed to attract teachers and providers as well (supply side of the marketplace). Funding issues, return on investment, as well as the challenges compounded by low technology adoption in the ACE community were discussed:

Trying to establish that type of business in the community education market, which has significant challenges in its own right: everything from technology adoption in the communities, which is low, to a very difficult value chain where it takes a lot of effort to get someone to teach a class. (Co-founder 2)

Co-founder 2 went on to talk about the scale and volume required to grow a startup business, and how *Chalkle* was trying to achieve their goals with very few resources:

Then there's very little return in the model for us with only the \$2 per person; so it needs a lot scale and volume to grow. What we learned if we look back on last year is to try and do what we were attempting to do requires quite a lot of capital to really give it a good go. If you look at similar projects or startups coming out of the States, they have a lot of capital, and that means having two-three years of very solid runway to be able to spend money, hire people, and do things. We were doing this off a very very small bootstrap and resources. (Co-founder 2)

Both co-founders addressed the challenge of trying to find the right business model and talked about the difficulties with user-pays models in ACE due to the population size in Aotearoa, New Zealand:

The hardest thing is trying to figure out a business model: it's definitely been one of the challenges because user-pays education in New Zealand, in the community education space, is not a big enough market. We're only four million across all of New Zealand but you've got four million in Melbourne alone. I think one of our business organisational challenges has been trying to do everything; and I think on reflection we tried to do everything and a little bit nothing at the same time, which has been sort of a challenge. (Co-founder 1)

Co-founder 2 agreed with the challenges associated with the user-pays model given the size of the market, and suggested that what *Chalkle* needed was a sustainable financial partnership of some sort:

I think because the actual market for running the classes doesn't stack up with the user-pays model, like there isn't enough money in the 8-10-15\$ classes to justify enough time to pay a teacher and an organiser, that we really need a partnership of some capacity. Whether that's public money in a more efficient mechanism than the old model or that's some sort of content partner or delivery person; we can't do it off nothing I think is the big learning. (Co-founder 2)

The staff turnaround which was a result of the lack of funding, presented a challenge not only for the *Chalkle* organisation but for some of the teachers as well. One of the teachers mentioned how staff turnaround at *Chalkle* meant constantly starting from scratch, and this interfered with building a community:

So many people left. [...] I have been behind the scenes all the time so I have seen so many people passing, working and, because they can't pay, people can't stay there for longer. I don't know if there are other reasons, but every time someone leaves, it's starting from scratch; and you don't create a community. (Teacher 1)

She also went on to say that the chalkle.com platform was not as transparent as the Meetup site in terms of letting people know who was involved with the organisation. When *Chalkle* was on Meetup, the organisers (co-founders) were very present; the organisation was smaller and the co-founders were responsible for organising the classes, so they had direct interactions with the learners and teachers. When the organisation moved to chalkle.com, it grew and the co-founders were no longer responsible for organising classes and did not have direct interactions with learners and teachers; therefore, users could not as easily see (and meet) the team behind chalkle.com:

I think also the new website, we don't see people, we don't know who's running these things. [...] People have to see people behind, they shouldn't only see the website. (Teacher 1)

Returning to the topic of technology adoption in the ACE community, one of the learnings for the co-founders was that this was a challenge in itself, and that perhaps they should have focused more on developing and supporting community education programmes. This was indeed one of the learnings which informed the start of Enspiral Academy and the *Always Be Learning* programme:

You can't just throw technology at a community and expect it to use it. And at the same time, we kind of built a platform for everyone and a little bit for no one. (...) and in retrospect perhaps we should've or could've focused more on programme and resource development rather than the tech building. (Co-founder 1)

One of the co-founders and one of the providers differed in their view of the best way to advertise classes. Indeed, the co-founder thought the 'old ways' of promoting classes were not reaching the right audiences and explained why *Chalkle* believed online technologies could be part of the solution:

So if we think about New Zealand and community education, the world of putting posters up and hoping that people show up, or printing out magazines once every six months, doesn't engage with the audience that it needs to engage with in order to get them interested to come to classes. So there's a gap there that we saw around online digital promotion and connecting people via a website. (Interview with co-founder 2)

In contrast, the provider thought that learners were probably used to more traditional modes of promotion for ACE classes (i.e., newspaper advertising works with people used to reading the news). She also added that she thought *Chalkle* needed to promote its classes to a wider audience:

There used to be a lot more community education providers, and people knew what classes they were doing because it would be in the newspaper or it would be sent out in a flyer or something. It was like: 'here you go, here are the

classes you can choose from; and this has come right to you, we're feeding it to you'. But people aren't necessarily motivated enough to go out and look and be like 'ok, where am I going to find this thing...' if it's not easily accessible. So I think it's advertising (the challenge). And I think the thing with *Chalkle* is that it's new and it's really well known by people who are in the right networks, but it's not really well known by the wider population. I think that could be a big part of it, advertising, getting it known to a wider group of people. (Provider 1)

Other interview participants agreed that one of the main challenges for *Chalkle* was promotion: getting known by the wider population and getting more learners using the platform. They also wanted more functionality from the chalkle.com platform in order to be able to track how many users were actually looking at the classes advertised:

I think user engagement, because I only see a notification when someone actually signs up (for a class). We might hear from someone: 'Ah yeah I saw that on *Chalkle* classes'. Really, people are seeing it? Cool. But are they the only one who saw that class or are there ten other people who saw it, or fifty? I wouldn't know. So more users would make a difference. (Provider 2)

The learner quoted below agreed that the platform needed more users and believed that *Chalkle* was potentially reaching a larger audience when it was on Meetup. She went on to say that she had not seen much advertised lately in her region in terms of classes she wanted to take or recommend to friends:

I would've thought when it was with the Meetup site that they would've had access to a wider range of people. Whereas now, they're not there, they're not very visible, they're not visible in (my region) at all. I wouldn't have known about them unless (my personal contact) had told me. I've mentioned it to other people, saying how good my class was, and that they should go on there and find out about other classes; but as I was saying, there's nothing on there for (my region) at the moment. So I don't know what's happened to it. (Learner 2)



Finally, one of the co-founders mentioned the challenge with the discrepancy between the speed of decision-making in a startup like *Chalkle* and that in other ACE organisations or providers using *Chalkle*. This could lead to not fully understanding each other and having trouble working together:

Some of the other roadblocks about *Chalkle* being developed has been the speed of decision-making in some of the organisations that are in the sector: so working with libraries is hard and it's slow; working with councils... We've been really lucky with Wellington City Council, but we've had not that much luck with other councils, and again they don't work to startup timelines. And just the nature of some of those organisations where you (at *Chalkle*) don't have the perspective of some of their challenges and how to interface with them. (Co-founder 2)

**Aspirations for the future of ACE and *Chalkle*.** During the individual interviews, I asked the two co-founders about their aspirations for ACE and *Chalkle*, and what opportunities they saw for what they referred to as the 'Renaissance of Learning'. One of the co-founders expressed their thoughts on the rising importance of technology in transforming various sectors of society:

So when I was saying where does the funding need to go: when you look at the different sectors of society, everything from travel, to accommodation, to banking, to marketing; technology has reformed them. Education is right in that space. Now we're just trying to figure out how to be transformed. [...] What is the role of the sector in the context of technology, in the context of no money, in the context of professional development, in the context of global scale capacity? There are all these elements that I can say *Chalkle* has had learnings from, but that's what the sector is having learnings from. (Co-founder 1)

She went on to talk about the importance of funding innovation in the ACE sector in order to allow the sector to try new things:

Then why do you study *Chalkle* as a case study? It's because we're trying to innovate in this space. That's the sector: it needs to wake up and try new

things! The old ways of working haven't been working and granted we (*Chalkle*) don't have the thousands of people we'd hoped for; we've definitely tried thousands of different things! Maybe one of the things is going to work. (Co-founder 1)

She referred to an application for UNESCO funding, when *Chalkle* and Enspiral Academy were running the *Always Be Learning* programme, which stated the potential of education to be transformed through innovation and building connections:

Because it's this: "A community that learns is a community that thrives" (quote from *Chalkle's* application for UNESCO funding); it's the connections, and it's the social fabric, and it's all of that stuff we've got to get into. (Co-founder 1)

Co-founder 2 talked about the software infrastructure that would enable the type of education needed to tackle the challenges we face as a society:

The same intention is definitely there around what is the software infrastructure for growing a 'Renaissance Learning Movement'? What is the software infrastructure for pulling together all of the teachers to be able to teach the things that need to be taught to change the way the world works? (Co-founder 2)

He went on to talk about the skills needed to face the challenges of today, and the content which could be covered through community education:

As the world progresses, we have a whole bunch of challenges that we've never had before: so where do we learn the skills to take all those (on); where do we learn collaborative entrepreneurship; where do we learn how to install solar panels; where do we learn basic financial literacy in an uncertain financial world; where do we learn digital literacy; where do we learn media literacy for a world where the media landscape is fundamentally changing? So there's an opportunity there but that's just speaking to content. (Co-founder 2)

Aside from content, co-founder 2 went on to talk about finding the mechanism which will allow communities to share knowledge and access educational opportunities without government funding:

The other side of it is what are the mechanisms that allow people who know things in our community to share? And at a New Zealand level, it's how do we do something that isn't centrally funded to have educational opportunities in our communities full stop? Because since the National Party pulled the funding for the ACE sector, it's more or less collapsed; so what happens there? And that's just a New Zealand market thing, but it's still right in front of us and very present right now. (Co-founder 2)

From Co-founder 1's perspective community education needed to be more industry-led and to connect people with experience and knowledge with others who could benefit:

In New Zealand, how and where can we have an education system that meets people where they're at? And moving forward, I think there's still a role for institutional education, but you need to be much more industry-led, much more taught by practitioners. This is what we're focusing on now: how do people with experience teach the people who want to learn? And that was one of the core ideas of *Chalkle*. (Co-founder 1)

When the data collection for this study ended (December 2015), *Chalkle* was exploring new models in terms of partnerships, even outside of community education, in order to drive their social mission. The co-founders talked about getting into the professional development sector, which includes the classes offered through the Enspiral Academy. They also talked about *Chalkle* needing a trigger of some sort, in order to develop the next phase of the organisation:

I think we're in the phase of the next experiments, or starting the next experiments. And I think we're in a phase of exploring outside of the community education sector. So, quite explicitly starting and supporting classes in professional development. (Co-founder 2)

I don't know the timing of *Chalkle*, like either it was too early or too late or something like that. It feels like for the future, it needs a trigger of some sort,

and I don't know what that will be. You know, it could be government funding, it could be a marketing campaign, it could be something...but I don't know what that something is. (Co-founder 1)

Finally, co-founder 2 talked about where *Chalkle* might be headed. He first addressed how they could use the provider model to further develop the online chalkle.com platform:

The Nelson Environment Centre and SafeStack have started using it (the platform), and we'll take feedback from them as well. Eventually, the ideal case scenario for us to get to where we get to is: we'll have one strong provider that we can help to run, and then we'll be able to feed the product (chalkle.com) that way. Then we'll look to see if that can exist and serve other markets, and hopefully kick start development (of the platform) again. (Co-founder 2)

He also talked about how *Chalkle* could make use of what they've learned in order to play a role in advocating for the ACE sector, and contribute to policy in the ACE sector:

At the same time, we're making quite explicit strategies around community education: everything that we've learnt around the funding models and other stuff, we're trying now to have those conversations with the right people in the public sector to see if and how we can get it funded. It might be that we start with writing a white paper and talking to ACE Aotearoa, and then see if we can move further into the Ministry of Education, or Tertiary Education Commission. That work is emerging as well but it's hard to do everything! (Co-founder 2)

Chapter 4 and Chapter 5 presented and discussed the main findings related to the research objectives: offering a rich description of the organisation, as well as exploring participants' motivations for engaging with *Chalkle*, aspirations, challenges, and opportunities for the organisation and the ACE sector in Aotearoa, New Zealand. The next chapter will focus on an in-depth discussion of some of the key themes which emerged from the data analysis.

# Chapter 6: Discussion and Conclusion

## Discussion

### *Chalkle: an emerging, fluid, and hybrid ACE*

**organisation.** I set out on this research project with the objective of offering a rich description of *Chalkle*, and its evolution from its launch in July 2012 to December 2015 (when the data collection for this project ended). My initial impression was that *Chalkle* might be a new form of adult and community education in Aotearoa, New Zealand: a hybrid organisation which operated at the intersection of non-formal education (community-based) and informal education (self-directed), which harnessed innovations in online technologies for connectivity, which employed a social enterprise business model, and which operated independently of state funding. I wanted to know if *Chalkle* provided an alternative to other ACE models and if it could survive as such, given the impacts of government funding cuts on adult and community organisations in 2009 and 2010, with some scaling back operations and some closing (ACE Sector Strategic Alliance, 2014; Harris, 2010; Leach, 2014; Tobias, 2016).

What the findings of this research project indicated was that the *Chalkle* organisation spent a great amount of time, resources, and energy in carving out a space in the adult and community education sector; however, that space seemed to be constantly changing its shape, with each iteration having a different focus. At the beginning, *Chalkle* saw itself as a provider of community education classes (while on Meetup); when they developed the chalkle.com platform two years later, they considered themselves more of an edtech social enterprise (an edtech startup with a social mission); and less than a year later, they returned their focus to programme development and supporting other providers in the ACE sector (with the Enspirial Academy and *Always Be Learning* programme).

Through these various phases (or iterations), *Chalkle*'s espoused social mission remained the same: to have a positive impact on the ACE sector by connecting more people who wanted to teach with people who wanted to learn. This capacity for connecting various providers, teachers, and learners was probably the greatest strength of the organisation throughout its different phases. This connectivity was based on existing partnerships, such as the collaboration with the Enspirial Network, and facilitated the development of new partnerships, such as with the Wellington Timebank: like-minded organisations which believe in working collaboratively, sharing resources and skills, building strong links within the community.

**Exploring motivations and their links with philosophical traditions.** Another of my research objectives was to explore the motivations for various groups of people engaging with *Chalkle*: the co-founders, teachers, champions, providers, and learners. I wondered if their motivations aligned with the same philosophical frameworks: liberalism (Adler, 1982; Bloom, 1987; Hirsch, 1987), learning for the sake of learning; humanism (Jarvis, 1992; Maslow, 1976; Rogers, 1969), making ACE more accessible to a wider population through a non-directive model of 'everyone can teach and everyone can learn'; pragmatism/progressivism (Dewey, 1916, 1956; Irwin, 2012), learner-centred, practical learning (focused on developing skills); or perhaps radicalism (Freire, 1970, 1972; Gramsci, 1971), a common belief in changing ACE delivery in Aotearoa, New Zealand. The findings indicated that the motivations expressed by participants in this study seemed to be independent of each other or aligned with different philosophical frameworks. For example, the co-founders aspired for *Chalkle* to be an opportunity for change within the ACE sector, a 'Learning Renaissance' (radicalism); they also aspired to provide the technology infrastructure, through an online platform, to encourage connections within the community and allow more people to participate in educational opportunities (humanism). On the other hand, learners' motivations for engaging with *Chalkle* appeared to be more pragmatic/progressive (Dewey, 1916, 1956), or instrumental; for example,

wanting to learn new skills (practical), interested in teaching that is learner-centred (fun, low-commitment), classes offered at a convenient time of day and at an affordable cost. That being said, the providers, champion, and teachers I interviewed did seem to identify with the co-founders' aspirations, with a few mentioning that they wanted to work with *Chalkle* because they were 'like-minded' and that *Chalkle* attracted people who were socially aware. It could be that these groups were more aware of *Chalkle's* aspirations, being directly in touch with the co-founders, compared to the learners who had very few opportunities to interact directly with the organisation. Nevertheless, philosophical views (and ensuing aspirations and motivations) are not mutually exclusive; they can change according to the social and political contexts from which they emerge, and can vary when applied in the context of 'day-to-day' practice (Bowl, 2014; Torres & Mayo, 2013). It could be beneficial to explore these beliefs, aspirations, and motivations in greater depth in future studies, and consider including research participants who have not engaged with *Chalkle* previously as a group for comparison.

**Social consciousness and lifelong learning.** Shared characteristics between the participants emerged during the individual interviews; one of them was the participants' common belief in social and community development and the aspiration to work to the benefit of their communities (humanism), sometimes working to bring about changes within their communities (radicalism). For example, many were involved in social causes (green transportation, refugee services) and volunteered for community groups (arts organisations, 'Dress for Success'). An interesting finding was that although this aspiration was common to all the interviewees, no one explicitly linked their social-consciousness with their engagement with *Chalkle*. Another common characteristic was that everyone interviewed had teaching experience of some kind (in formal, non-formal, and informal contexts) and everyone seemed to alternate between teacher and student roles with ease. The interview participants clearly valued education, learning, and teaching, and many considered themselves to be 'lifelong learners'. Being a lifelong learner

and having a social conscience was part of their identity (progressivism, humanism). These values, particularly those linked with progressivism and humanism, were reflected in the classes facilitated through *Chalkle*, including topics such as: *Mindfulness*, *Work Less Save the World*, *Worm Farming* and *Bee-Keeping*, *Ekodo (Compassionate Environmental Action)*, *Make Your Own Beauty Products*, to name a few.

***Chalkle: the edtech social enterprise.*** These strengths and shared characteristics associated with *Chalkle* (a capacity for connection, a common belief in education, an orientation towards social development and wanting to have an impact on the ACE sector) originally pointed me in the direction of social movements' literature (Clyne, 1972; Freire, 1970, 1972; Gramsci, 1971; Lovett, 1988; Martin, 2006; Thompson, 1980; Tobias, 1996, 2016) as a framework for this research project. However, as other aspects of the *Chalkle* organisation emerged (out of the constructivist approach and constant comparative analysis), such as the emphasis on technology as well as regular references to a social enterprise business model, my focus deviated in order to attempt to more accurately describe the organisation through its different iterations. Indeed, *Chalkle* focused heavily on technology, especially while developing the platform *chalkle.com*, which served both as a communication technology tool (website that supports digital communication between its users) and as an operational technology tool (booking, timetabling, financial management) (Seels & Richey, 1994). I was hoping to explore in greater depth communication technologies and edtech in the context of the ACE sector in Aotearoa, New Zealand and globally. Unfortunately, the time and resources for this project meant that this topic was not covered extensively in this thesis. This represents an area which is under-researched and would be an interesting direction for future research, especially with the rise of edtech and online course offerings (eg. MOOCs). The findings of this study seemed to indicate that technology adoption and even interest in technology and online platforms in the ACE sector was still quite low. Another interesting aspect which appeared through the findings was the use of terms and expressions not



readily associated with the ACE sector: some relating to business, such as ‘product’, ‘double-sided marketplace’, ‘startup’, ‘social enterprise’, and ‘collaborative entrepreneurship’; and some relating to technology such as ‘software infrastructure’, ‘tech platform’, ‘interface’, and ‘connectivity’. Finally, the roadblocks *Chalkle* experienced were equally interesting in painting a more complete portrait of the organisation, perhaps especially the challenges associated with funding, as they had a significant impact on *Chalkle*’s aspirations and social mission, as well as the business models they explored.

**Issues with funding.** Although the 2009-2010 government funding cuts to the ACE sector featured as one of the influences on *Chalkle*’s genesis story, the struggle for funding remained a constant throughout the period during which I observed the organisation. By the end of the data collection period, *Chalkle* was still searching for a sustainable funding model to ensure its existence. The lack of stable funding for *Chalkle* made it difficult to scale up the organisation and even to sustain technology development. It meant that the co-founders’ attention needed to be on other ventures and projects in order to raise the funds necessary to re-inject into the organisation. The co-founders sometimes had to work on chalkle.com ‘for free’ in order to make enough profit from the classes to keep the platform running. In turn, this made it difficult to invest time and resources for relationship building and keeping stakeholders on board and ‘in the know’ about what was going on. The lack of funding made it difficult for the co-founders to promote *Chalkle* to a wider audience of learners (and providers) and encourage them to use the platform. One of the challenges of an exclusively online presence is the potential of not being ‘seen’, which came through in the interviews. The teachers and providers would have liked more users to be engaging with chalkle.com in order to reach out to a wider audience with their classes.

The challenges impacted from the lack of funding were on par with the challenges faced by other types of ACE organisations which no longer receive government funding (Bowl, 2011, 2014; Bowl & Tobias, 2012; Leach, 2014; Tobias, 2016), and the promise of the social enterprise model did not seem to

be successful in delivering different outcomes in this regard. More research would be useful in determining whether social enterprises can serve as a viable solution to areas of social provision no longer covered by the state in a neoliberalist policy framework. Some of the critics of the social enterprise business model would likely suggest that the operating model for *Chalkle* was influenced by neoliberal ideology and was heavily reliant on people seeking development opportunities through self-directed learning and ‘user-pays’ classes (Bowl, 2014; Grant, 2008). For the teachers, champions, and providers, this meant using the website as a tool to facilitate the promotion and organisation of classes, aspects they could no longer afford with the withdrawal of state funding. The company seemed to be confronted by a paradox, as without making a decent profit from the price of classes, they lacked the funds to reinvest into *Chalkle* in order to develop (and maintain) the platform, and as a consequence, would struggle to meet their social and educational aims. Both co-founders mentioned in their individual interviews that the user-pays market in Aotearoa, New Zealand was not big enough to offer a sustainable source of income, and they were concerned with accessibility for those who could not afford to pay for classes.

Practical and theoretical lessons can be learned from an analysis of the challenges posed by the global dominance of the neoliberal agenda in adult education (Bowl & Tobias, 2012):

First, the possibilities for adult education that exist beyond the state and its apparatus; second, the need to recognize the power of the state to support or attempt to strangle adult education by controlling or withdrawing funding; third, the need for broadly based alliances across and beyond education. (p. 272)

**A model for collaboration.** Perhaps the lure of an edtech social enterprise such as *Chalkle* resides in the potential that it can provide an alternative self-sufficient ACE model that responds to the challenges identified in the literature and in the socio-political context of Aotearoa, New Zealand. As discussed, *Chalkle*’s greatest strength was its power to harness technology in

order to enable connectivity; partnerships ‘across and beyond’ the education sector ensued from its operation: the partnership with the Enspiral Network as well as collaborations with the Wellington Timebank and Enspiral Academy. In these partnerships may lie solutions for future directions in the ACE sector, especially if most of the sector keeps being overlooked by government for funding. Indeed, one of the key aspects *Chalkle* seemed to offer in light of reforms to the ACE sector was a decentralised approach to offering educational opportunities based on the needs of local communities. This collaborative approach with partners, at the intersection between community education, business, and technology, could potentially help ensure the survival of ACE opportunities independently of the state, as suggested by Bowl and Tobias (2012), and it may well represent another valuable future direction for research in the ACE sector.

## Conclusion

This thesis provided an in-depth examination of *Chalkle* and offered a substantive analysis of its past operations, policies, procedures, and practices. *Chalkle’s* mission was to transform the field of Adult and Community Education (ACE) in Aotearoa, New Zealand. I have explored the challenges, risks and opportunities afforded by *Chalkle* from the perspective of a variety of different stakeholders: learners, teachers, providers, and co-founders.

I made a number of interesting findings related to the case study of *Chalkle* during the years 2012-2015. These include the observation that in a climate where state funding for the ACE sector is limited and precarious, *Chalkle* was in a position to offer an alternative adult and community education model, which had the potential to survive independently of the state. This was largely due to its primary strength, which was the capacity to generate collaborative partnerships across and beyond the education sector (e.g., with the Enspiral Network and the Wellington Timebank). However, *Chalkle* was also very much subject to some of the key conditions of neoliberalism, meaning that it was reliant on a user-pays model, it had a constant struggle to attract and maintain funding, and it had to change form

and focus to suit the requirements of funders (such as UNESCO and the Wellington City Council).

The case study of *Chalkle* confirms the political nature of adult and community education, the tensions between social development and economic development priorities, as well as how difficult it is to secure funding in an environment where government policies constantly change. I have argued that these factors are the inevitable result of the neoliberal discourse on the ACE sector in Aotearoa, New Zealand.

**Implications for policy and practice.** This case study contributes to the emerging fields of research in adult and community education, social enterprise business models, and educational technology, where there is a paucity of empirical research available to date. Although this study provided a detailed analysis of *Chalkle*, authors such as Patton (2002) have noted that case studies may or may not be generalisable to other cases and other contexts. I would argue that case studies, especially in the adult and community education sector (a policy and practice-oriented field) should be used as vehicles for reflection and learning in order to improve policy and practice. As discussed in this thesis, adult and community education is contextual, and a case study such as this one can serve to shed light on various elements in that context (socially, politically, culturally, historically) at a specific point in time. This, I would argue, is one of the most interesting contributions the study of *Chalkle* has made: it has highlighted an organisation located at the intersection of adult and community education, social enterprises, and education technology. As a startup, *Chalkle* was evolving at a rapid pace and trying many things along the way. In Aotearoa, New Zealand, at a time of expanding online connectivity, of increasing demand for educational opportunities outside of compulsory education, and of exploring non-state sources of provision of services, key learnings from the case study of *Chalkle* can be used as stepping stones for developing 'best practice' and policy in adult and community education.

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# Appendices

## Appendix 1: Key Components of *Chalkle* (with Screenshots)

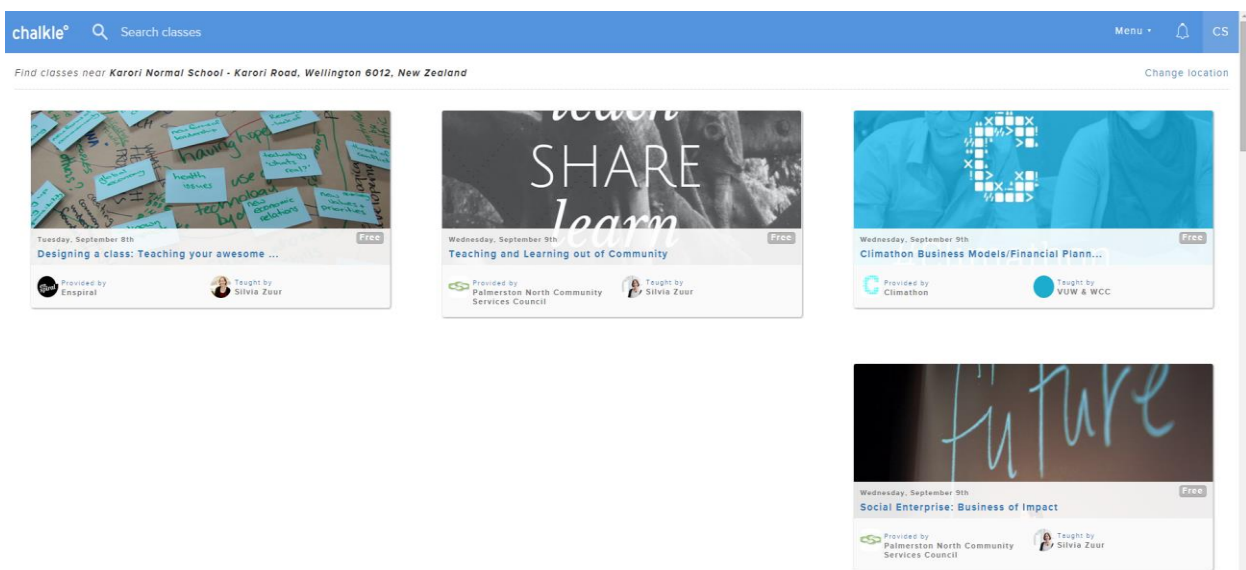
*Chalkle*'s key components, and related terms and concepts used throughout this thesis, are described below with accompanying screenshots.

**'Chalkler':** This term is specific to *Chalkle*'s initial configuration on the Meetup website ([www.meetup.com/sixdegrees](http://www.meetup.com/sixdegrees)): 'Chalkler' refers to a subscriber (member) of the *Chalkle* Meetup group, who presumably participated in one or more classes organised by *Chalkle* through Meetup, or subscribed to browse the classes available through the group (as *Chalklers*, members received notices by email when a new class was being offered). No longer managed by *Chalkle*, the group at one time counted more than 1,600 *Chalklers*. The *Chalkler* term signals the period when *Chalkle* was a provider (organiser) of community education classes and had a direct relationship with the members who would register to the classes. Below is a screenshot of *Chalkle*'s homepage on the Meetup website, indicating on the left the number of *Chalklers* at the time the screenshot was taken (November 2015):



**‘Class’:** In *Chalkle* terminology, a ‘class’ designated a single activity/event which members could register for and attend. When they were using the Meetup website, *Chalkle* organised the classes; however, when they moved to their standalone chalkle.com platform, classes were organised by the various providers. A wide variety of topics were covered by the *classes*, as the idea was that anyone could organise and teach a *class* about any topic of their choosing; by extension of that principle, the *classes* took various forms (lecture, workshop, conference) and ran for various lengths of time (one-off, block course spread over a few sessions, regular weekly sessions).

*Chalkle* encouraged providers to organise classes which were focused on being social and fun; this concerned the mode of delivery more than the topic itself, as some of the topics were quite serious in nature. *Classes* were also low-commitment and generally low-cost (e.g., seven out of the 16 classes in the screenshot, below, were free and six were between \$10 to \$20). A screenshot of some of the *Chalkle* classes offered during the week of 6 September 2015 is below:



(Continued on the next page).



Wednesday, September 9th  
**Box fit class** \$12.00  
Provided by Central City Boxing  
Taught by Asher Derbyshire



Thursday, September 10th  
**Facilitation: Theory U** Free  
Provided by Palmerston North Community Services Council  
Taught by Silvia Zuur



Thursday, September 10th  
**Rights & Rules: Employment Related Tax f...** Free  
Provided by Palmerston North Community Services Council  
Taught by Manawatu Community La...



Sunday, September 13th  
**Monthly - speak in Spanish and free salsa...** Free  
Provided by Spanish corner  
Taught by Leticia Murillo



Monday, September 14th  
**Ken-Wa-Fu**  
Health, harmony, prosperity - through the science of martial arts  
**health & wellbeing: tai chi wellness prog...** \$6.00  
Provided by Horowhenua  
Taught by Tai Chi Academy



Monday, September 14th  
**Mindfulness 101 Full Course (4 Classes)** \$50.00  
Provided by Mindfulness for Change  
Taught by Nick Laurence



Monday, September 14th  
**Mindfulness 101: Class 1** \$10.00  
Provided by Mindfulness for Change  
Taught by Nick Laurence



Tuesday, September 16th  
**Which Supplements?** \$10.00  
Provided by Wellington Timebank  
Taught by Marion Leighton



Wednesday, September 16th  
**Box fit class** \$12.00  
Provided by Central City Boxing  
Taught by Asher Derbyshire



Thursday, September 17th  
**Simple spatial data design** \$20.00  
Provided by Espiral  
Taught by Simon Tegg

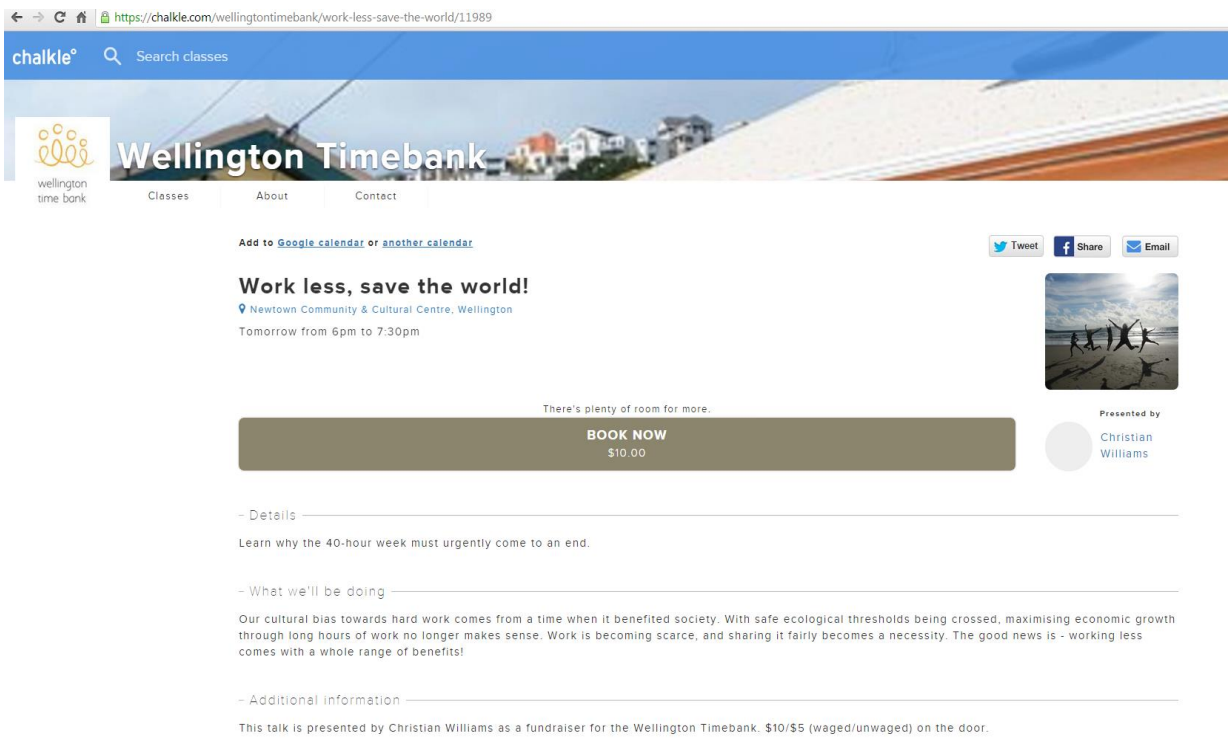


Saturday, September 19th  
**How do adults REALLY learn?** \$100.00  
Provided by Double Farley Creative Partners Ltd  
Taught by Melissa Farley




Saturday, September 19th  
**A Grafting Workshop for 19th Century Heri...** \$35.00  
Provided by Nelson Environment Centre  
Taught by Nelson Environment Ce...

The screenshot below captures an individual class I attended as an observer for the purpose of this research:



← → ↻ 📄 🌐 <https://chalkle.com/wellingtontimebank/work-less-save-the-world/11989>

chalkle® 🔍 Search classes

 **Wellington Timebank**  
Classes About Contact

Add to [Google calendar](#) or [another calendar](#)

**Work less, save the world!**  
Newtown Community & Cultural Centre, Wellington  
Tomorrow from 6pm to 7:30pm

There's plenty of room for more.

**BOOK NOW**  
\$10.00

Presented by Christian Williams

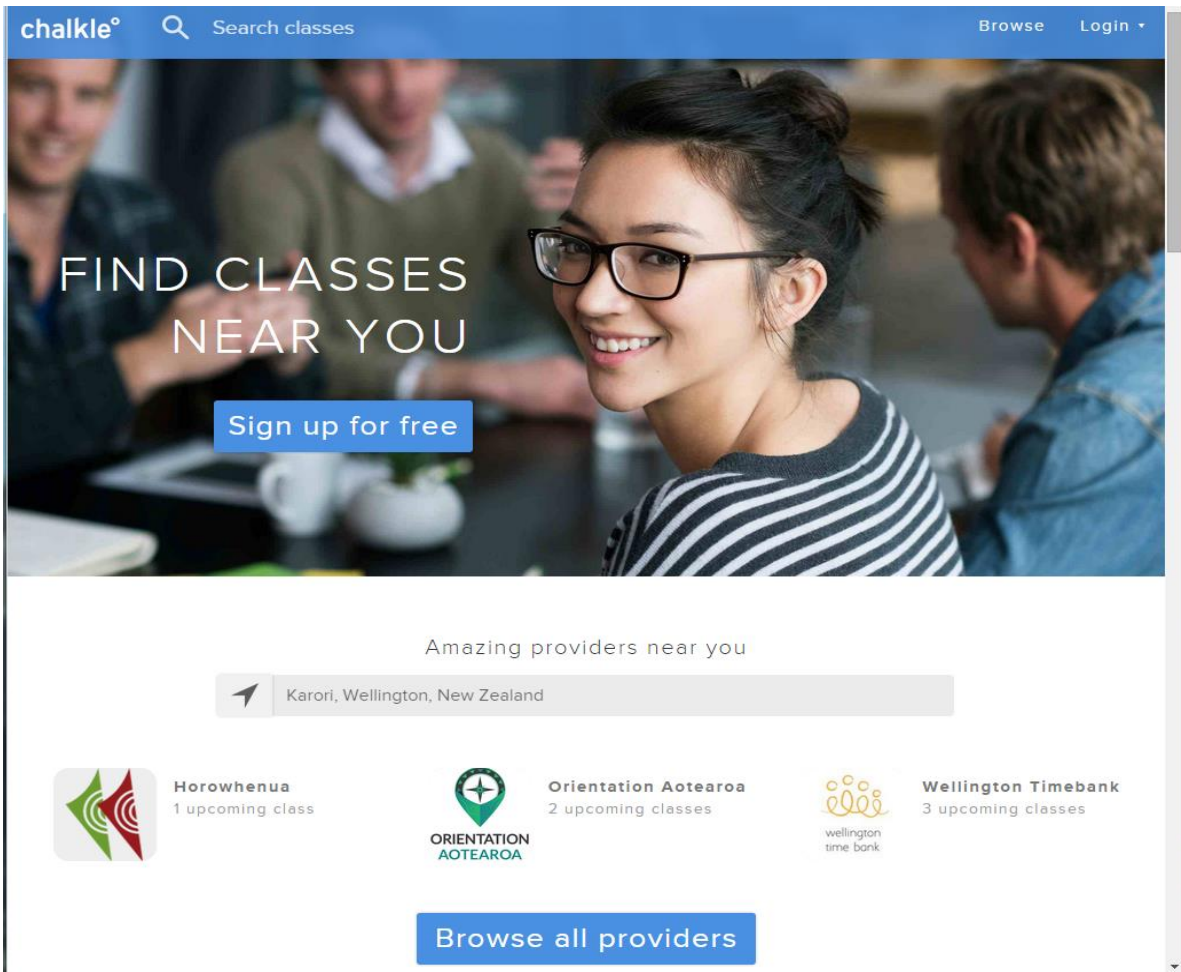
— Details —  
Learn why the 40-hour week must urgently come to an end.

— What we'll be doing —  
Our cultural bias towards hard work comes from a time when it benefited society. With safe ecological thresholds being crossed, maximising economic growth through long hours of work no longer makes sense. Work is becoming scarce, and sharing it fairly becomes a necessity. The good news is - working less comes with a whole range of benefits!

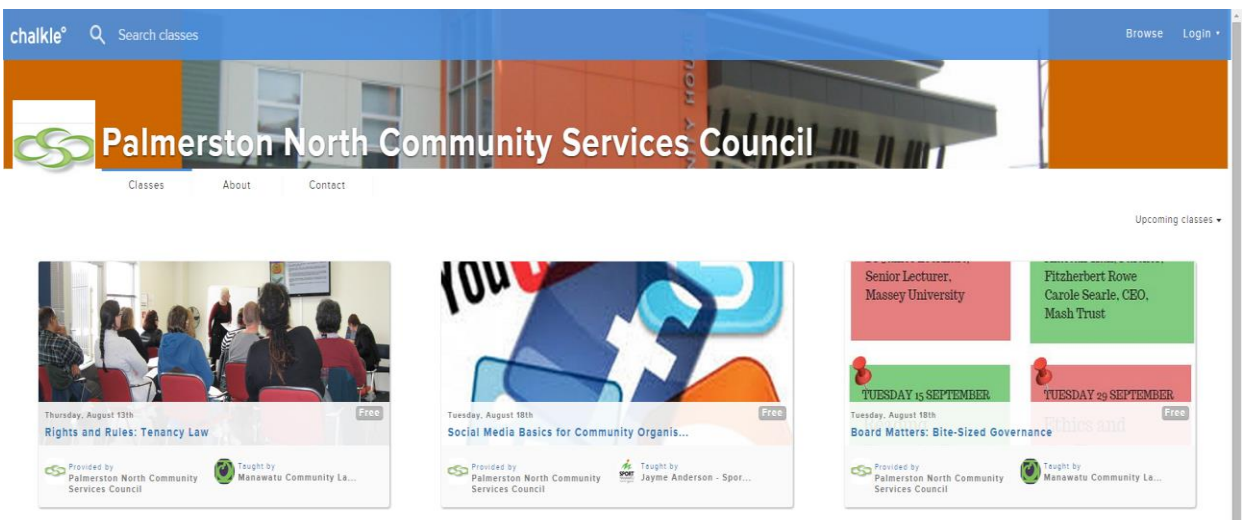
— Additional information —  
This talk is presented by Christian Williams as a fundraiser for the Wellington Timebank. \$10/\$5 (waged/unwaged) on the door.

Finally, *classes* took place in various locations: community centre halls (like the class shown above, *Work less, save the world!*), office spaces, train stations, workshops and studios, libraries, parks and beaches, private kitchens; as many varied locations as there were topics.

**‘Learners’, ‘providers’, ‘teachers’, ‘champions’, and ‘co-founders’:** One of the interesting facets of *Chalkle* was that, throughout the various phases, it engaged not only individuals (learners and teachers) but also other community education providers. There have been various terms for the people involved, which are described in this section: *‘learners’, ‘providers’, ‘teachers’, ‘champions’,* and *‘co-founders’*. The term *‘learner’* is the simplest to define: it refers to someone who attended a class/event organised through chalkle.com. Equally straightforward by definition, the *‘co-founders’* established the social enterprise and were responsible for setting the strategic direction and managing the day-to-day operations. The term *‘provider’* refers to someone who listed classes on chalkle.com. It is important to note that *providers* could be individuals or organisations, and were responsible for listing the price, time and date for the class/event. On occasion, the *provider* was also the teacher of the class, but more often the *provider* listed classes that other people taught on behalf of the organisation. Some of the *providers* who listed the classes observed during the data collection for this project are the Wellington Timebank (*provider* only), Orientation Aotearoa (*provider* only), and Spanish Corner (*provider/teacher*). The screenshot on the next page shows the *providers* organising classes during the week of 17 May 2015:

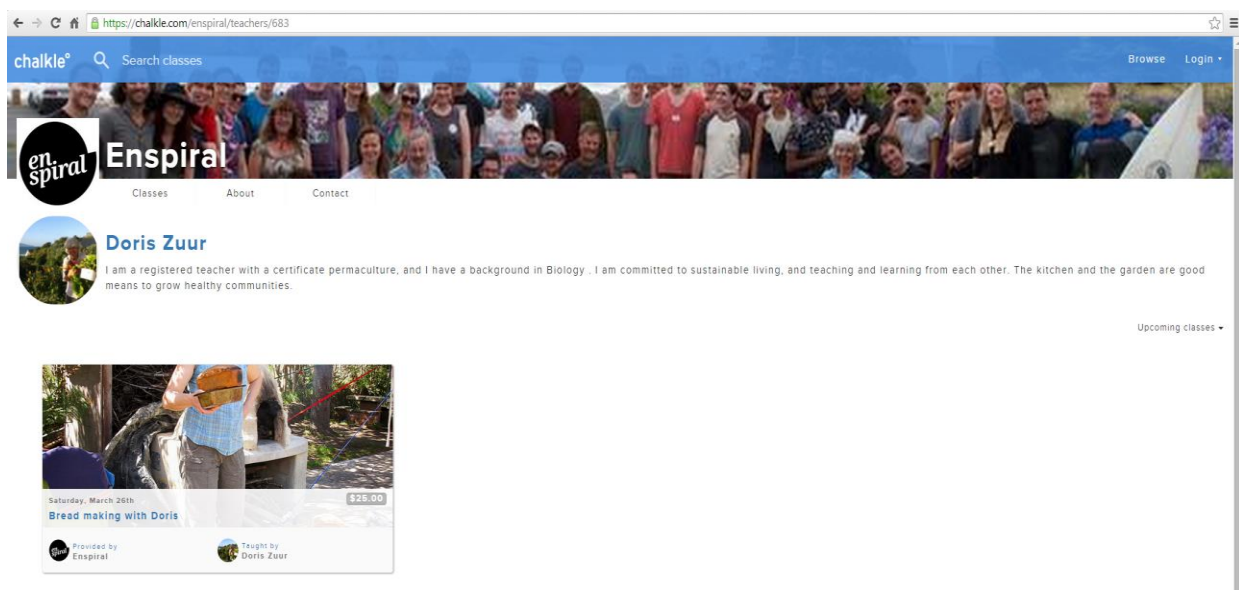


The screenshot below is of a *provider* information page, in this case the Palmerston North Community Services Council, listing their classes during the period of 13-18 August 2015:



Following on from providers, a ‘*champion*’ was someone who had a provider role in a region, and who was selected to take part in the *Always Be Learning* (ABL) programme (in 2015). A *champion* could also be someone who taught ACE classes in a region; though their main responsibility as part of the ABL programme was to support other providers in their community to organise classes by using the chalkle.com platform.

Strickly speaking, a ‘*teacher*’ was someone who taught a class (or multiple classes) listed by a provider on the chalkle.com platform. A *teacher* was usually associated with a particular provider but could also teach classes for more than one provider (and as mentioned previously, in some cases, the *teacher* and the provider were the same person fulfilling two roles). *Teachers* were responsible for the content and the delivery of the classes. The screenshot below is of a *teacher*’s profile on chalkle.com:



## The chalkle.com platform defined

When describing the chalkle.com platform, it would be useful to compare it to a similar website such as Airbnb ([www.airbnb.co.nz](http://www.airbnb.co.nz)), an online vacation rentals service which members can use to advertise their dwelling or browse and book available rentals in particular cities for particular dates. In terms of legality, chalkle.com was also similar to Airbnb in such that *Chalkle* was not responsible for the quality of the classes listed on its chalkle.com website (the providers were) and its main service was offering a space where users on both



end of the market place (providers/teachers/champions and learners) could connect and make transactions online. Some of the functionalities of the platform, aside from advertising classes and booking for classes, included browsing for classes by region or by provider, making payments (for learners), and downloading class lists (for teachers/providers). The platform also allowed learners to communicate with providers and teachers, and for providers and teachers to communicate with the learners registered in their class and share resources through the discussion board.



## Appendix 2: List of Interviewees and their Relationship to *Chalkle*

### Learner 1:

- woman, 20-25 years of age, university degree
- involved with Enspiral Foundation
- involved in Dev Academy
- attended 1 class organised through *Chalkle* on Meetup

### Learner 2:

- woman, 50-55 years of age, university degree
- personal contact worked for *Chalkle*
- lives in a region outside of Wellington
- attended one class organised through chalkle.com in that region

### Learner 3:

- woman, 30-35 years of age, university degree
- personal connection of the researcher
- attended one class organised through chalkle.com in Wellington

### Provider 1:

- woman, 20-25 years of age, university degree
- worked for *Chalkle*
- organised more than ten classes through the chalkle.com platform
- attended two classes organised through chalkle.com in Wellington

### Provider 2:

- woman, 20-25 years of age, alternative tertiary degree
- personal connection of the co-founders of *Chalkle*
- organised more than five classes through the chalkle.com platform

### Champion 1:

- woman, 25-30 years of age, university degree
- selected as part of the first cohort of the Always Be Learning programme run by *Chalkle*
- organised classes in her region using the chalkle.com platform
- attended training sessions and received mentoring from *Chalkle*

### Teacher 1:

- woman, 25-30 years of age, university degree
- contributor to the Enspiral Foundation and worked for *Chalkle*

- one of the first to organise and teach classes for *Chalkle* (Meetup and chalkle.com)
- attended five classes organised through *Chalkle* in Wellington

Teacher 2:

- man, 30-35 years of age, university degree
- member of the Enspiral Foundation and worked with *Chalkle*
- taught two classes for *Chalkle* (Meetup and chalkle.com)

Co-founders (1 and 2):

- woman and man, 30-35 years of age, university degrees
- were flatmates and are both members of the Enspiral Foundation
- use *Chalkle* to organise classes, events, workshops, and conferences
- taught more than ten classes for *Chalkle* (Meetup and chalkle.com)
- attended numerous *Chalkle* classes (Meetup and chalkle.com)

## Appendix 3: Interview Guides

### Potential Questions for Interviews (*Chalkle* Learners)

1. Can you tell me about your experience with Chalkle.com: How long have you been using *Chalkle*? How did you learn about it? Why did you decide to use it?
2. How would you describe chalkle.com to a friend?
3. What (adult-education or community-based) courses and classes have you taken? (examples: language classes, skills-based, interests, volunteer training.)  
Tell me a bit about these classes: how did you hear (find out) about them?  
What about these classes did you like/not like about them (benefits/challenges)?
4. Which type of learning are you interested in? (format: online course, hands-on/workshop, classroom, fieldtrip)
5. What are your reasons for taking classes (outcomes: qualification/certificate, meeting people, learning new skills)? What value do you place on education (with a distinction between formal-obligatory and informal-voluntary)? Has your experience of formal education influenced how you see informal/adult education?
6. What's important to you when deciding whether or not to take a class? (enticers/deterrents: recommendation/reputation, pricing, location, time investment)
7. What voluntary-organised activities do you participate in (examples: sports, clubs, volunteering)? What level of commitment do you invest in these activities (time/money/responsibility)? What benefits (and challenges) do you derive from these activities?
8. Are you involved in social movements/activism? Do you perceive chalkle.com as a social movement - if so, why, and if not, why?

**Potential Questions for Interviews (*Chalkle*  
Teachers/Providers/Champion)**

1. How did you find out about chalkle.com?
2. Why did you decide to organise/teach classes through chalkle.com? (How were you organising classes previously?)
3. How would you describe chalkle.com to a friend who would like to organise/teach a class? To a friend who wants to learn/take a class?
4. What community-based/adult education classes have you organised/taught? Have you taught in other contexts as well? (examples: primary/secondary; polytechnic/university; professional development; ESL)
5. Have you taken adult/community education (or informal education) classes as a learner? If so, which ones (could include workshops/conferences)? What benefits have you derived from these classes? What challenges have you come across (time commitment, price, format of teaching)?
6. What are your motivations for organising/teaching community-based education classes? (Why are you in the ACE space?) What value do you place on education (distinction between formal-obligatory and informal-voluntary)? Has your experience of formal education influenced how you see community-based (informal) education? (for example, different value, preference for one or the other)
7. What do you think would make a difference to chalkle.com's uptake?
8. Are you involved in social movements/activism? Do you perceive chalkle.com as a social movement - if so, why, and if not, why?

**Potential Questions for Interviews (*Chalkle* Co-Founders)**

1. Why do we need chalkle.com? (Why now?)
2. How can ACE be improved in NZ? What does the *Renaissance of Learning* look like?
3. What was *Chalkle* meant to be initially? How does it differ now from what you had originally conceived?

4. What's made a difference along the way to how *Chalkle* has developed? (follow up with: I'm equally interested in what's made a positive difference as well as what's been challenging/road blocks?)
5. Where do you think chalkle.com is at right now? (follow up with: Where is it heading/end goal? What's going to make a difference to get it to the end goal?)
6. How does technology figure into it? (what are the benefits/challenges)
7. Can you tell me about why/how you came to be involved with chalkle.com?
8. How is *Chalkle* structured? How are classes structured? (Power dynamics, decision-making – for *Chalkle* and various stakeholders)
9. Are you involved in social movements/activism? Do you perceive *Chalkle* as a social movement - if so, why, and if not, why?

