

RESEARCH ON THE EDUCATION AND LEARNING OF ADULTS

# Private World(s)

Gender and Informal Learning  
of Adults

Joanna Ostrouch-Kamińska and  
Cristina C. Vieira (Eds.)



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**ESREA**

European Society for Research on the Education of Adults

## **Private World(s)**

## RESEARCH ON THE EDUCATION AND LEARNING OF ADULTS

### VOLUME 3

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*(On behalf of the European Society for Research on the Education of Adults)*

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*Gender and Informal Learning of Adults*

*Edited by*

**Joanna Ostrouch-Kamińska**

*University of Warmia and Mazury, Poland*

and

**Cristina C. Vieira**

*University of Coimbra, Portugal*



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**English correctors**

*Barry Golding, Annette Foley and David Anthony Tucker*

**Reviewer**

*Edmee Ollagnier, Ex-University of Geneva, Switzerland*

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# **THE EUROPEAN SOCIETY FOR RESEARCH ON THE EDUCATION OF ADULTS (ESREA)**

ESREA is a European scientific society. It was established in 1991 to provide a European-wide forum for all researchers engaged in research on adult education and learning and to promote and disseminate theoretical and empirical research in the field. Since 1991 the landscape of adult education and learning has changed to include more diverse learning contexts at formal and informal levels. At the same time there has been a policy push by the European Union, OECD, UNESCO and national governments to promote a policy of lifelong learning. ESREA provides an important space for these changes and (re)definition of adult education and learning in relation to research, theory, policy and practice to be reflected upon and discussed. This takes place at the triennial conference, network conferences and through the publication of books and a journal.

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The major priority of ESREA is the encouragement of co-operation between active researchers in the form of thematic research networks which encourage inter-disciplinary research drawing on a broad range of the social sciences. These research networks hold annual/biennial seminars and conferences for the exchange of research results and to encourage publications.

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- Access, Learning Careers and Identities
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- Gender and Adult Learning
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- Life-history and Biographical Research
- Migration, Ethnicity, Racism and Xenophobia
- Policy Studies in Adult Education
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## **ESREA TRIENNIAL EUROPEAN RESEARCH CONFERENCE**

In order to encourage the widest possible forum for the exchange of ongoing research activities ESREA holds a triennial European Research Conference. The conferences



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have been held in Strobl (1995), Bruxelles (1998), Lisbon (2001), Wroclaw (2004), Seville (2007), Linköping (2010) and Berlin (2013).

#### ESREA JOURNAL

ESREA publishes a scientific open access journal entitled *The European Journal for Research on the Education and Learning of Adults* (RELA). All issues of the journal can be read at [www.rela.ep.liu.se](http://www.rela.ep.liu.se). You can also find more information about call for papers and submission procedures on this website.

#### ESREA BOOKS

ESREA's research networks and conferences have led to the publication of over forty books. A full list, giving details of the various publishers, and the books' availability, is on the ESREA website. ESREA's current book series is published in co-operation with Sense Publishers.

Further information on ESREA is available at [www.esrea.org](http://www.esrea.org)

*Emilio Lucio-Villegas*

*Barbara Merrill*

*Marcella Milana*

*Henning Salling Olesen*

## 1. INTRODUCTION

### *Gender and World(s) of Informal Learning*

Social life has its fundamental organizers, some of them resulting from the heritage from the past civilizations, which are deeply embedded in cultural norms, values and attitudes. Among these organizers gender is one of the most important because it is grossly related to general categories of masculine and feminine, traditionally used to characterize people according their biological sex. Such association gives the impression that this dichotomy corresponds to the binomial male versus female, reducing consequently the great diversity of characteristics that men and women can have and their potential expressions as human beings. Glover and Kaplan claim that gender is an “active concept”, commonly used in many different contexts which leads to a widening of its use and loss of its sharp meaning (Glover & Kaplan, 2000, p. ix).

Research on gender shows that gender stereotypes have not been changed very much in recent decades (Best & Williams, 1993; Maccoby, 2000; Alvarez, 2014), and gender still constitutes one of the basic categories used by people to understand and explain their social worlds and also to evaluate themselves as mothers, fathers, professionals, citizenships, political leaders, and so on. The problem is that this pattern of evaluation causes differences in people, in areas such as vocational choices, professional careers, and work versus family roles conciliation, among many others. Nature-produced distinctions are used, as Bauman argues, as “building blocks or reference points” (Bauman, 2014, p. 8) for a mechanism of creating and putting into operation “different set[s] of social distinctions only loosely related to their alleged natural causes” (Ibidem).

The main difficulty with a ‘gender sensitive analyses’ of reality is that gender is commonly associated with an unequal distribution of power between men and women. This vision was clearly expressed by Scott (1986), when she wrote that:

... gender is a primary way of signifying relationships of power. It might be better to say, gender is a primary field within which or by means of which power is articulated. (p. 1069)

Following her critical analyses, the tacit messages that transmit such beliefs about gender and social order can be thought of as comprising four different components: culturally available symbols (religious figures; historical heroes); normative concepts (where masculine and feminine are included); political organization of institutions (families, schools, etc.), and individual identity.

In order to ensure a consistent use of concepts in this book, we try to follow the ideas of Oakley (1972), reinforced by Deaux (1985) several years later, with the term sex being used to refer to individuals that are biologically male or female. The term gender is applied to mention mainly the socially constructed nature of attributes, roles and characteristics that are commonly ascribed to men and women, according to a dichotomous and stereotypical reasoning. Gender is therefore a cultural and social construction, sometimes weakly corresponding to the real potentialities of men and women, also depending on time, place and culture. According to Bradley, gender is simultaneously a material and cultural phenomenon which refers both to real experiences of men and women's relations, and to ideas which name them and transmit different meanings (Bradley, 2007).

The power of gender messages and their stereotypes appear to function as normative criteria in the socialization of young generations, beginning in the family context (Vieira, 2013) and having correspondence in broader contexts like school, media and peer groups, among others (Pinto, 2013; Renzetti & Curran, 2003; Brannon, 1999). Although many mothers and fathers think that they try and to counteract gender stereotypes and other forms of discrimination in the process of raising their girls and boys (Vieira, 2006), it is common within the family to see practices that reinforce the pervasive influences of gender, either through parent role models or through the organization of family life (tasks, assignments, roles, etc.) (Ostrouch, 2004; 2005). The same happens in schools in aspects of curriculum content, handbooks, organizational culture, hidden curriculum, reinforcing messages that young people learned at home. In macro analyses of social contexts, we can also find powerful sexist messages in videoclips (YouTube) (Malho & Teixeira, 2014), in literature for children and in the broader media.

According to Alvarez (2014),

... societies remain strongly gender stereotyped and sexism is far from having been eliminated from contemporary societies' organization and functioning and from social and interpersonal relationships between men and women<sup>1</sup>.

This kind of social organization is not only transmitted by formal ways of teaching inside educational institutions, but also easily acquired through socialization and other forms of informal and formal learning in diverse situations and environments across the lifespan. Therefore the adult education field cannot ignore the importance of empowering people, both men and women, to deal critically with this state of affairs and to counteract all forms of gender stereotypes that are pernicious to individual freedom.

Before we go further in this chapter, it is important to clarify the concept of informal learning and its place in adult education, both in informal and non-formal contexts. By learning, we agree with Lerner and others (1986) that learning can lead to a relatively permanent change in behavior as a result of the learning experiences. We treat 'learning' as a process, not as a result; as an active and social behavior, in which different meanings are created in order to better understand reality (Bron, 2006).

This way of understanding learning is a part of a wider humanistic paradigm related to philosophical and theoretical assumptions of the theory of social construction of reality by Berger and Luckmann (1966), among others.

A learner is an active and proactive person, holistic and intentional, who not only adapts to conditions or situations, but simultaneously creates and transforms the social world in which he/she is located (Bron, 2006). In addition to proactively affecting the attitudes of the learner, a socio-cultural context of learning is also emphasised. In this way, we can observe the extension of a space of learning from the dimensions of a classroom, a book or a teacher to the system of ‘human being – the world’ (Malewski, 1998). Knowledge is not treated as an ‘esoteric’ product of the best educated specialists which exists in a world separated from everyday life. It is defined in a wider context, as in critical education. It symbolizes everyday life experience and consists of many different versions of a social world (Malewski, 2010).

Such experiences can occur in organized contexts, like schools and universities, which have a planned curriculum, defined teaching time, supervised activities by tutors and the possibility of offering a certification or diploma to the individual. This is usually called formal education and corresponds to the institutionalized educational system (Colleta, 1996). In contrast, following the proposal of Coombs and Ahmed (1974), non-formal education was defined as organized, systematic, educational activity which is carried on “outside the framework of the formal system to provide selected types of learning” (Coombs & Ahmed, 1974, p. 8) to children, youth and adults. These authors also offered a third type of education, called informal education, defined by them as:

... the lifelong process by which every person acquires and accumulates knowledge, skills, attitudes, and insights from daily experiences and exposure to the environment. (Ibidem)

From this perspective, knowledge is always connected with the time, place and context of its creation; it is a system of socially produced truths. Learning is thus a natural process that occurs in everyday life, often without being treated by learners as learning.

Most learning of adults is experienced informally, through the daily interactions among people in their everyday lives. This idea is underlined by Knowles and others who show that adult learning focuses on everyday life (Knowles, Holton & Swanson, 1998). Adults acquire competencies that enable them to cope and act effectively and quickly with the many problems they face in everyday life. Such knowledge and skills are directly applicable to and can be implemented in daily routines, though not undertaken in a conscious manner. They are often based on tacit knowledge, which may not be verbalized by women and men, but they have it and use it every day.

One of the earliest attempts to reflect on and systematize informal education was the work by Knowles entitled *Informal adult education* (1950). Knowles stressed that adults learnt best in contexts that are informal, comfortable, flexible and free from fear. These assumptions are visible in further definitions of informal learning by

Livingstone (1999, 2001) and Schugurenky (2000). In fact, any tentative definition of informal learning should refer to the most influential theories of adult learning focusing on the learning capacities of adults outside standard teacher-directed classroom settings (Knowles, 1970), should emphasize individual self-directed learning resources (Freire, 1970, 1994) and should take into account initiatives in collective learning through dialogue, as well as theories of cognitive development (Vygotsky, 1978), always recognizing the importance of diverse social relations beyond the educational institutions to the shaping of adult social consciousness. Livingstone (1999) did so when he described informal learning as:

... any activity involving the pursuit of understanding, knowledge or skill which occurs outside the curricula of educational institutions, or the courses or workshops offered by educational or social agencies. The basic terms of informal learning (e.g., objectives, content, means and processes of acquisition, duration, evaluation of outcomes, applications) are determined by the individuals and groups that choose to engage in it. Informal learning is undertaken on one's own, either individually or collectively, without either externally imposed criteria or the presence of an institutionally authorized instructor. (p. 5)

Schugurenky (2006) emphasises tacit knowledge in his definition of informal learning:

Informal learning usually results in tacit knowledge. To a large extent, this is due to the fact that informal learning does not occur in the context of certain elements that can assist learners in organizing the acquired knowledge in relation to particular content areas. Among these elements are a planned curriculum, textbooks and didactic materials, the presence of an instructor, clear educational objectives, evaluation procedures and the like. Informal learning occurs in a more diffuse and disorganized manner. (p. 2)

According to those definitions, the most important features of informal learning include: learning from others mainly through imitation and observation in everyday actions and activities; responsibility of a learner for acquiring knowledge, and the lack of an official curriculum. The most important learning of adults occurs in irregular, often intense moments of people's lives, and has no ending. Going further and highlighting the implications for learning by men and women in everyday life and stressing their active role as learners, this book distinguishes explicit informal learning from everyday experience, socialization and other tacit learning by men and women's conscious identification of the activity as significant learning. This approach is consistent with Livingstone's (1999) emphasis on:

the important criteria that distinguish explicit informal learning [are] the retrospective recognition of both a new significant form of knowledge, understanding or skill acquired on one's own initiative and also recognition of the process of acquisition. (p. 5)

This distinction is also consistent with the typology of informal learning offered by Schugurensky (2000), who proposed three types of informal learning: self-directed, incidental, and socialization (p. 3). These types are described in Table 1, according to two above mentioned criteria: the intentionality of the learning process and the awareness of it at the time of learning experience.

*Table 1. Three forms of informal learning*

<i>Form</i>	<i>Intentionality</i>	<i>Awareness (at the time of learning experience)</i>
Self-directed	yes	yes
Incidental	no	yes
Socialization	no	no

*Source: Schugurensky (2000, p. 3)*

Schugurensky characterizes self-directed learning as a process where the person has the intention to learn something and do it alone even without the help of a supervisor. This method of knowledge acquisition is common among individuals with a very high intrinsic motivation to learn, and who are strongly autonomous in finding resources and guiding the learning process. Such self-directed learners go through a process of self-teaching (autodidaxy), because they are able to learn without an instructor (Oliveira, 2005; 2007). Despite his or her autonomy, the autodidactic learner is not necessarily self-sufficient. As Hrimech (2005) underlines, he or she “may seek experts and resources to help in achieving goals, but planning is quite loose” (p. 311).

According to Schugurensky (2000) incidental learning is unintentional but conscious. These incidental kinds of learning experiences occur in situations where a learner “did not have any previous intention of learning something out of experience, but after the experience she or he becomes aware that some learning has taken place” (p. 4). Incidental learning is also referred to as random learning, the latter term being used by UNESCO (2005) to refer to: “unintentional learning occurring at any time and in any place, in everyday life” (p. 4).

Finally, socialization refers to the unintended and unaware processes of the incorporation of values, attitudes, behaviors and skills across the lifespan. This occurs in all contexts of life. The messages are carried and learned through several forms of information (language, imagery, artifacts, etc.), some of them explicit and noisy, and others silent and subliminal (Schugurensky, 2000). Learning, while powerful, is typically not recognized as learning since it is incorporated into everyday activities and interrelationships. Together with acting, it constitutes an invisible path of personal development.

Although young people and adults are not mere imitators of models, because they play an active role in constructing their cognitive and emotional world(s), this

tacit knowledge relates also to social gender order. This tacit knowledge can be constructed in a silent but pervasive way, are reinforced by ordinary routines as well as absences. For example: “each time a girl opens a book and reads a womanless history, she learns that she is worth less” (Sadker & Sadker, 1994, p. 13, cited in Johnson-Bailey, 2005, p. 266). The same situation is in case of boys – each time a boy sees action movies in which male heroes do not show their feelings of fear of risks or sadness, he learns that the expression of emotion is not an expected behavior for boys. These processes are connected with incidental transmission of attitudes with highly diverse and culturally relative patterns for gender personal roles and relationships (Ostrouch-Kamińska, 2011).

In fact, the normative power of stereotypical messages associated with gender carries penalties for both women and men, which may constitute real obstacles to an individual’s freedom to learn and to make decisions, to choose areas of study and professional domains, to participate in civic and political organizations in community, or even to be responsible for the management of family life, in areas such as the autonomy for caring for dependent others (children, elders) or the routine aspects of domesticity (Vieira, 2013). Such inequalities undoubtedly continue to affect and sometimes contaminate the way men and women exercise their citizenship and how they evaluate themselves as members of a fully democratic society.

Due in part to a reaction to the hegemonic trends of research fettered by positivism, with its biased, male-dominated construction of knowledge – both as researchers and as subjects of scientific samples –, in the last three decades literature and research in adult education has begun to purposely include women as participants, recognizing the fact that women’s experiences are qualitatively different from those of men (Hayes & Flannery, 2000). Even more recently, some researchers have similarly begun to purposefully analyse men in adult education as being male gendered, in order to start to explain some men’s absences and exclusions (Golding, 2012; Foley, Golding & Mark, 2014).

Nevertheless there is still not enough presence of gender questions and reflection on gender and education in most adult education discourses (see Dybbroe & Ollagnier, 2003; Ostrouch & Ollagnier, 2008). This is a worrisome omission considering the fact that one of the principles of the field is to raise awareness of people, foster critical thinking and help combat discrimination. According to Johnson-Bailey (2005), the major themes relative to gender in adult education literature in the past years have been focused on feminist pedagogy, the hidden curriculum, the classroom climate, women’s silences, women’s voices, and collaborative learning. This book will add new contributions to this list of topics, addressing the links between gender and informal learning of adults in different contexts of life and through singular experiences. The process of informal learning by which people acquire and accumulate knowledge, skills, attitudes and insights from daily experiences emerges in the book as a socio-cultural phenomenon, which influences each individual’s identity and each one’s perception of his/her place in the world. We emphasise that this process is not explicitly or intentionally recognized by the individual as a way



of appropriating messages and learning, which mostly constitute normative rules of behavior.

In this book, twenty-two authors use a diverse range of theoretical perspectives in equally diverse contexts to research and discuss how the processes of informal learning is related to gender, and how gender differentiates learning activities of individuals and groups in different contexts. In thirteen chapters it gathers data and insights from Europe and Australia involved in European Society for Research on the Education of Adults Network on Gender and Adult Learning. Most of them are results of extensive empirical research conducted in the broad field of humanistic and social sciences, such as adult education, psychology, sociology, social work, management and philosophy, with important results that have the potential to inform and improve critical interventions.

It seeks to foster the debate and reflections on topics such as: gender and theories of informal learning; gender and lifelong learning and development across non-formal contexts; gender and various practices of daily life; gender dimensions in the interactions with others (friends, family, school or work colleagues etc.), and gender and experiences of people as (informal) learners and educators. After an introductory chapter by the editors devoted to concepts' clarification and to a reflection about the importance of including and exploring gender issues in the broad field of adult education and research, in order to elicit and promote in a positive way multiple forms of informal learning by both women and men throughout life, the book is divided into three parts.

The first part, entitled *Private Spheres* relates to learning that can occur in more private or intimate spheres of life, including four chapters that deal with subjects that can be seen as more restricted to the privacy of interpersonal relations. The first chapter, by Katarina Popović, Maja Maksimović, and Aleksandar Bulajić (*Gender Printed in a Social Mask – An Exploration of Resistance in Adult Education*) explores the question on how gender identity creation processes were related to regressive transformative learning during the time of war and isolation in Serbia. A discourse analysis, applied on interviews conducted with young urban males in the capital of Serbia, showed that the drastic reshaping of the social structures which are based on “masculine”, physical and political power caused collective regressive transformation. Gender identity shaped in such cultural frameworks proved to determine goal, content and type of informal learning in a restrictive way, creating resistance to the new kinds of learning which arguably create significant changes of perspective.

The second chapter in this part is by Joanna Ostrouch-Kamińska (*(L)earning Power: Gender and Power Based on the Commitment to Marital Relation*). It presents the strategies of learning and earning power based on the commitment to relationship by spouses in the process of building their marital relationships. The source of the reflection is biographical research (in-depth interviews) which the author conducted with dual-career couples. She shows that title kind of power (unlike power as a result of domination) is connected with system of values, self-esteem and respect for a



spouse. It is observed in egalitarian marriages, based on the principles of equality, justice and freedom. Such a scheme of power is transmitted both in the process of socialization, and gained by people in the process of learning in marriage.

Astrid Seltrecht, in her chapter entitled *Not Just for Women. Breast Cancer, Gender and Informal Learning in an Exceptional Situation*, focuses on the informal appropriation processes required for men with breast cancer, not just women, to seek a doctor, which is the precondition for breast cancer diagnoses. The author claims that the learning processes for patients begins with appropriating the disease: only after having learned that they have a certain disease, or are ill, and that further learning processes take place within the context of the disease.

The last chapter in this part of the book is by Joana Pisco Véstia da Silva and Cristina C. Vieira, titled *The Value of Informal Learning for Illiterate Older Women across the Lifespan: Perceptions of Elderly Women From a Rural Region of Portugal*. It emphasises the learning strategies that illiterate women over 65 years, living in the municipality of Estremoz (Portugal's interior south), used across their lifespan to perform their several roles as women, mothers and wives. Through a qualitative research methodology and listening to the voices of interviewees, their investigation crosses gender issues with age and the contexts where those women grew up, stressing the constraints of the learning process.

The second part of the book is titled *Minorities and Activism*. It contains three chapters that are concerned about gender issues and activism initiatives that seek to give voice to people that are suffering or who have experienced several types of gender-based discrimination. In the first chapter, entitled *Bearded Women: Feminist Activism of «La barbe» as a Form of Adult Learning and Education*, Catherine André and Elisabeth Hofmann describe a French network of women - "La Barbe", that seeks to denounce male domination in official institutions, private and public decision making bodies or important public events (conferences, etc.) concerning the political, financial and other "high level" spheres. Their research analyses the informal learning effect of this activism, according to the activists' own perceptions, taking into account the ways in which the network, the public appearances and their preparatory processes are organised.

The following chapter is by Letitia Trifanescu, called *Against Patterns of Domination. Migration as an Act of Empowerment and Learning*. The author focuses on gendered domination relations that become a part of a collective history as they are transmitted through generations, and arguably create pre-destined trajectories. Through the analysis of life narratives of women, she highlights the role of this type of gendered interaction within migration paths, as potentially providing incentives for a learning and transformation process and the expression of an empowered subject.

Barry Golding and Lucia Carragher, the authors of the third chapter in this part of the book entitled *Community Men's Sheds and Informal Learning: An Exploration of Their Gendered Roles* explore some of the gendered dimensions behind informal learning through community men's sheds in Australia and Ireland. They confirm

the multiple, supportive, and critically important roles women play behind the apparently simple Men's Shed organisation names and its 'bottom up' model, 'by men and for men'. They not only illustrate why being mainly or wholly for men is important, but also why women's roles have been important since the genesis of the first men's sheds in 1999, and why women remain important to the success and spread of the men's shed movement in four countries to 2014. They emphasise that there are strong arguments for fundamentally changing some service delivery models to informally accommodate for the acute learning and other complex needs of some men in some male-gendered spaces. They also show the resistance and ambivalence from some women because of the important gains women have made, professionally and personally, in terms of their own informal learning in community settings in the past three decades, which they understandably don't want to relinquish.

Part three (*(Non)formal Contexts of Informal Learning*), is devoted to different formal and non-formal contexts of informal learning, gathering four chapters that approach themes related to gendered knowledge and experience of people acquired through the process of informal learning. The chapter by Susana Villas-Boas, Albertina L. Oliveira and Nátalia Ramos (*Gender and Intergenerational Programmes*), presents findings of needs analysis of the residents of the parish of Bonfim, within the city of Porto in Portugal. It underlines that gender inequalities have resulted from the different roles played by each person throughout life, and that gender should be considered while planning and implementing different intergenerational and educational programs, belonging to non formal and informal spheres, grounded on reciprocal orientation processes, influences, exchange, learning and solidarity between the members of two or more generations. The authors also make some suggestions in order to promote gender equality.

Małgorzata Ciczowska-Giedziun, the author of next chapter entitled *(In)formal Education as a Space of Creating Personal Beliefs on Gender*, explores the meaning of informal education in constructing gender assumptions for students preparing to work as social workers. She claims that their awareness of these beliefs has an impact on perception, attitude and behaviour towards clients in social work. She also describes how to create a kind of platform where the knowledge of gender obtained in informal education merges with the processes of formal education that qualify students for social work.

Martina Endepohls-Ulpe, Elisabeth Sander, Georg Geber and Claudia Quaiser-Pohl in their chapter *How They Became Different: Life Courses of Women Working – Successfully in the Field of Science, Technology, Engineering and Mathematics (STEM)*, analyse biographies (collected by semi-structured interviews) of fifteen female Austrian scientists and six German scientists working in the fields of science, technology, engineering or mathematics. Results suggest that for these women, informal learning through parents, siblings or peers might have provided a chance to overcome gender stereotypes with regard to their vocational choices, and that facilitating conditions in the family were one cause for their academic careers.

The last chapter by Elmira Bancheva and Maria Ivanova is entitled *Informal Learning in the Workplace: Gender Differences*. The authors present the findings from research carried out by the School of Management, New Bulgarian University, in 2013. The research examined the learning methods for female and male managers and executives, their informal learning, and the effect of gendered roles on their participation in the workplace. They show that in order to understand women's learning at work, the social context that dictates gender roles, organizational culture and leadership must be considered as an important context of informal gendered learning.

The book is finished by the chapter *Informal Learning and Gender: a Revision for the Future*, contributed by the book editors. It is a reconstruction of main issues analysed by authors in their chapters, described in the context of what new perspectives have been applied to the field of adult education as well as some broader implications. We underline that the development of gender awareness in adult education literature and research topics, as well as the use of gender lenses by adult educators to analyse reality, are crucial to better understand both the social world and different educational processes. Following some reflections about methodological challenges that may be faced by adult education research agenda in the near future, we discuss the contribution of the book to the discourse of gender and informal learning of adults, as well as the gaps it fills. It also traces possible paths for future research based on new questions raised in all chapters.

We deeply believe that the book can enrich the field of adult education research and practice. We anticipate it will also promote the use of gender lenses to both analyse reality and to act on it to improve the life of present and future generations of women and men, respecting their individual value and necessary diversity as human beings and citizens.

#### NOTE

- <sup>1</sup> Speech to the European Council Seminar, *Combating Gender Stereotypes in and through Education, Helsinki, Finland, October 2014*. Full text available via: <http://www.coe.int/t/dghl/standardsetting/equality/05conferences/2014NFPHelsinki/Speeches/Speech%20Teresa%20Alvarez%20Final.pdf>

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*Joanna Ostrouch-Kamińska*  
*Faculty of Social Sciences*  
*University of Warmia and Mazury*  
*Poland*

*Cristina C. Vieira*  
*Faculty of Psychology and Sciences of Education*  
*University of Coimbra*  
*Portugal*

**PART I**  
**PRIVATE SPHERES**



KATARINA POPOVIĆ, MAJA MAKSIMOVIĆ AND  
ALEKSANDAR BULAJIĆ

## 2. GENDER PRINTED IN A SOCIAL MASK

*An Exploration of Resistance in Adult Education*

### INTRODUCTION

Gender identity has been one of the most important aspects in studies on education and learning, but remains rather neglected in adult education. However, it is generally accepted that gender identity is largely socially constructed through social mechanisms. In times of crises, this process tends to become even more specific, which leads us to our main research question - how gender identity, created among young males in the war period in the 1990's in ex-Yugoslavia, generates resistance toward some aspects of learning that are perceived as inadequate (Veselić & Popović, 2008). We agree with Jones (2006), who claims that militarism in recent historical times has been essential to the construction of hegemonic masculinities that emphasize competition, physical hardness, conformity and a sense of elite membership. Internalization of such disciplinary technologies (Foucault, 1988) that transmit and maintain discourse creates a need for confirmation and reproduction of gender identity. The research focuses on the process of how hyper masculinity, that was the dominant discourse during 90's, created resistance amongst male learners who, we believe, tend to reject, or simply perceive as unattractive, learning aspects (certain aims, content and method) that are seen as feminine. This resistance extends not only to typically female activities, but also to some characteristics of learning that belong to female culture, including public exposure of vulnerability.

### THEORETICAL FRAMEWORK: LEARNING HETERONORMATIVITY

Three main theoretical concepts shaped the framework for our research: heteronormativity and masculinization, transformative learning theory and informal learning, including resistance to learning.

*Heteronormativity* is the concept introduced by Berlant and Warner (1998), comprising:

The institutions, structures of understanding and practical orientations that make heterosexuality seem not only coherent-that is, organized as sexuality-but also privileged. Contexts that have little visible relation to sex practice, such as life narrative and generational identity, can be heteronormative in this



sense, while in other contexts forms of sex between men and women might not be heteronormative. Heteronormativity is thus a concept distinct from heterosexuality. (p. 548)

Times of war, crises and isolation strengthen heteronormativity in society, especially among young males, who are exposed to these influences and to the drastic reshaping of the social structures which are based on masculine, physical and political power. Through power-relationships, such persons are forced into traditional gender roles, including their many social manifestations. Since local context has tremendous influences on discourses, especially on those related to identity aspects (see Elliker, Coetzee & Kotze, 2013), we focus on a group of young males growing up in the capital of Serbia, in the decade 1991 – 2000, when the country was deeply involved in the war in former Yugoslavia, experiencing rapid and extreme pauperization, physical and political isolation and bombing campaigns, which is exactly the context for emerging hegemonic masculinity.

One definition of manhood continues to remain the standard against which other forms of manhood are measured and evaluated. Within the dominant culture, the masculinity that defines white, middle-class, early middle-aged, heterosexual men, is the masculinity that sets the standards for other men, against which other men are measured and, more often than not, found wanting... This is the definition that we will call 'hegemonic' masculinity, the image of masculinity of those men who hold power, which has become the standard. (Kimmel, 2001, pp. 271–272)

Traditionally, men are seen as aggressive and violent while the characteristic of weakness has been assigned to women who were victimized. Victims are considered weak and helpless, while men are seen as strong and powerful. Our main assumption is based on recent research proving that extreme heteronormativity creates victims for both genders, in one way or the other. The basic act of "being pushed into the role" and forced to follow the norms and rules imposed by the social group in a local context, is the basis for this approach (see Sivakumaran, 2007). It is difficult to say how far this socially dictated identity became internalized and genuine part of the person, if the prescribed social role and self-determination merged into the new and authentic "self" (as much authentic as any process of socialization in any age). It is also possible that this identity related and dictated set of values and behaviours were accepted just as the consequence of much needed adaptation to the drastic change of the context – a kind of a *social mask*.

The nineties in Serbia led to a strong process of masculinization, the need to promote and preserve masculine identity, and learning behaviour was an important part of this process. The choices that have been made, especially in non-formal and informal learning, were influenced by imposed gender roles, and persist today in several ways.

Since school played an unimportant role (as a place for learning and education) in this period, and the formal educational system rapidly lost its influence on both

societal and individual level, learning moved outside of the formal educational system, which remained just a place for peer communication and stage for practicing new gender roles.

The next concept which frames our research is *informal learning*. Being led by participants' narratives, we will allow informal and non-formal categories to be indefinable. Informal learning can be classified as one of those notions that create problems for theorists of an adult education. Although it so close to common sense understanding and intuitive reasoning, its confluent nature seems to prevent any more or less scrutinized efforts to determinate and define it. Again, dichotomies between rational, scientific, cognitive approaches, and practical ones that emphasize experience in situated settings (Molander, according to Livingstone, 2001), seems to imply that informal learning can only be understood in more practical, contextualized and experiential traditions of inquiry.

Some early efforts to define of informal learning classified it within a typology (formal, non-formal, informal and self-directed learning, see Mocker and Spear, 1982) based upon the criterion of who controls goals and means of learning on an individual – institution continuum. Informal learning became a category in which an individual controls the means of learning while an institution holds control over its goals. This definition however, in our opinion, hides a significant weakness, an inner incongruence. Informal learning is often understood as a residual of non-formal education (which is institutionalized). So therefore, as the residual of this institutionalized type of learning, informal learning occupies a space outside of it and cannot be institutionalized *per se*. On the other hand, definition of Mocker and Spear (1982) emphasizes that informal learning is being in control by an institution in a domain of goal setting. It seems that the element of institutional control is to be removed from the conceptualization of informal learning if a relatively clear understanding of the concept is to be achieved. After review of relevant concepts of informal learning, it can be noted that the definition of informal learning draws upon two sources of validity: localized context and its relation to predefined curriculum. In this manner, informal learning is often referred to as learning that takes place at work, at play, during leisure time, and also outside of educational institutions (see Coombs & Ahmed, 1974). On the other hand, it is sometimes defined as “[...] any activity involving pursuit of understanding, knowledge or skill which occurs without the presence of externally imposed curricular criteria” (Livingstone, 2001, p. 4).

Schugurensky proposed a taxonomy of informal learning based upon two criteria, intentionality and awareness, which led to differentiation of three forms of informal learning: incidental (“learning en passant” in Reischmann’s model, 1995), self-directed learning and socialization. As stated previously, in nonformal and formal learning situations, an institution emerges as a constant. As learning is taking place in artificial surroundings of planned and organized education, qualified and authorized people (teachers, instructors) and certified processes (defined by programs and plans) appear as key elements of control. One can ask the question as to whether are

there are some similar analogies valid for informal learning. To answer this question, one needs to take several steps back and return to some elements of definition.

As previously stated, at the boundaries of informal learning, control of the learning process is often in the domain of a learner. But what happens if, as in Schugurensky's typology, criteria of intentionality and awareness vary? Then, it must be the case where both awareness and intentionality are low or even non-existent in situations of learning, and therefore the learner's control over a process is insignificant or even non-existent. People always interact with others as well as with material and non-material products of others (culture). Learning process can take place in wider social surrounding outside of the control of educational institutions (informal learning). Hypothetically, a learner might not be aware of, or have an intention regarding a particular learning act. In this case, it must be that some different forms of others, that are not institutions and they representatives; appear as source of control over individual's learning process. We conclude that social processes and culture, as well as behaviour of other people, seem to be sources of influence that control a type of informal learning in which a learner is unaware and unintended regarding learning itself. This type of informal learning is none-other than the process of socialization, often defined as internalization of values, behaviours, attitudes, knowledge and skills that take place in everyday life, and are not under the significant control of an individual. When it comes to gender identity, it is our premise that it is supported, empowered and sometimes imposed through a form of socialization often referred to as heteronormativity (Schlicht & Westbrook, 2009).

Schugurensky's model also places self-directed learning in the class of informal learning, but in contrast to socialization, it has attributed qualities of being aware and intended by a learner. Of course, even in self-directed learning it is possible that an individual will use different materials or even consult other persons to aid his or hers learning. Nevertheless, the key is that in self-directed learning, the control is in the locus of an individual. Even other, more knowledgeable individuals are simply addressed as a means and aid to learning, not as imposed key authorities or mentors (Bulajić, 2008).

We assume that engagement in informal learning is closely related to heteronormativity (Berlant & Warner, 1998), a conceptual tool that might yield new insights about gender relations (Wiegman, 2006) and learning. Informal learning often takes place in private and intimate spaces that are perceived as liberated from social influences. On the contrary, Baerlant and Warner (1998) suggest that "there is nothing more public than privacy" (p. 547). Even though we do not speak about sex acts, there is obvious sexualisation of other private zones such as various activities of informal learning. They are coloured with lifestyle norms that hold people into binary and dimorphic gender roles; a norm that implies that heterosexuality is the only sexual orientation, and that a "heterosexual couple is the referent or the privileged example of sexual culture" (Baerlant & Warner, 1998, p. 548). Heteronormativity goes beyond regulation of a sexual and romantic relationship; it standardizes many other practices by suggesting identities that fit the norms. By following Foucault's

thought, we can understand heteronormativity not only as norm but as discourse, and imply the mechanism of normalization in order to comprehend its functioning (Maksimović, 2012).

For the purposes of exploring how heteronormativity creates resistance toward various aspect of informal learning, such as content, aim and method, we will refer to *transformative learning theory*, particularly the recent idea introduced by Illaris (2013) who suggests that transformation can be regressive as well as progressive. The idea of negative transformative learning enables us to understand how past experiences of informal learning, which in relation to gender identity, often took place in peer groups during primary and secondary education, created resistance toward learning that threaten the image of strong macho men. Since the participants in their interview responses, did not create a clear demarcation between informal and non-formal learning, we will not insist on the division in data interpretation. We will look at children's and teenage retrospective experiences of being male, in men between 25 and 35 years of age, and explore how specific social and economic contexts created a desirable identity of macho men, which in adult life create barriers to learning activities that could disrupt that image.

Transformative learning helps us to understand the significant changes that can happen in the non-formal and informal spheres of life. As most authors believe, it usually relates to the process of affecting change in a frame of reference, and its main task is to develop autonomous thinking. It is about understanding one's life experiences, by self-reflection and critical reflection of the assumptions upon which our interpretations, beliefs, and habits of mind or points of view are based. As Mezirow points out,

we may be critically reflective of assumptions when reading a book, hearing a point of view, engaging in task-oriented problem solving (objective reframing), or self-reflectively assessing our own ideas and beliefs (subjective reframing). (Mezirow, 1997, p. 7)

Therefore, transformative learning can happen in any framework and context, as long as transformative learners move towards a frame of reference that is more inclusive, discriminating, self-reflective, and integrative of experience. It could occur in a formal learning context, but it is more likely that context of non-formal and informal learning will support the transformation process and critical reflection. It might be seen as a contradiction: The lack of awareness and intentionality (which is usually taken as characteristic, even *differentia specifica* of informal learning) excludes transformative learning, since for the transformation the learner is supposed to become more critical and aware, and he/she needs to recognize the frame of reference and to participate effectively in the discourse (Mezirow, 1997). On the other hand, if certain types of informal learning are considered; such as self-directed ones (meaning: in the context outside of institution and distant from predefined curriculum), then it is exactly them which could create the assumptions for the transformative processes and development of autonomous thinking.

For a long time the conception of transformative learning has been based on two basic assumptions: it happens mainly on the cognitive level, and it is a kind of learning that creates positive changes. The first assumption is based on Mezirow's approach, which stresses the cognitive process of reflection, analysis, reasoning, problem posing and solving. Newer approaches to transformative learning have broadened this view to the other aspects – body-related processes and the role of emotions. Thanks to psychological analyses of the process of transformative learning, it can be related to the concepts of self and identity, which are multi-aspectual. In Mezirow's approach, transformative learning is closely related to the concept of meaning and meaning perspective, and to the cognitive aspects of learning. However with Illeris (2013), Dirkx (2006) and Kegan (2008) it got a broader understanding since they have included other aspects and elements. For example, Dirkx's concept (2006), based on the Jungian approach, includes the elements of *self* and *image* (which comes very close to our question about relationship between gender identity as genuine self or, as the opposite, a social mask), while Illeris insists that transformative learning should include all of the three basic dimensions of learning: the cognitive, the emotional, and the social (Illeris, 2002, 2007). Further on, he insists that the concept of transformative learning comprises all learning, which implies changes in the identity of the learner (Illeris, 2013). Extensive discussion on the role of self and identity within the concept of transformative learning did not lead to an accepted definition, but opened the field to sociological views on the development of identity in the late modern age (for example Giddens, 1991). Radical changes of the life situation are not seen just as adjusting or changing our self-perception in relation to our environment, local as well as global. This transformation could be also seen as the process by which we deal with the constant possibility, and urgent necessity, to change and transform elements of our identities (Illeris, 2013).

Besides the expansion of the idea of transformative learning, the other, even more significant, although controversial phenomena emerged. It is the new understanding: progressive transformation can sometimes be too demanding and challenging for the learner, so that the outcome is withdrawal or regression - not positive change, but negative one. Even a negative change could be considered as a kind of transformation. Regressive transformative learning usually happens in situations when the learner does not have the strength or qualifications to get through with something new, and then must resign and accept things as they are and find a more secure position (Illeris, 2013b). The understanding that transformative learning can be of both, a progressive and a regressive character seems to be rarely analysed (except in Illeris, 2007 and 2013b), although it is easy to witness such process in everyday life, especially in crisis situations when person is not able to cope with the challenge. The notion that learning can be regressive might sound as a blasphemy for adult educators, but since learning and education are not value-neutral – regressions can occur. The fact that critical and autonomous thinking should take precedence over the uncritical assimilation of knowledge in a “real” transformation, does not explain

why the opposite happens. But the concept of identity and collective identity (since many authors allow the concept of transformative learning as collective process) raises the issue of regressive learning.

Therefore, we relate construction of male gender identity in the context of “hyper heteronormativity” during situations of crisis to regressive transformative learning (Illeris, 2013b). Regressive learning itself could be criticized for its normative character, but progressive transformation could be the subject of same criticism. It is always a question of power over decision as to what is regressive in learning. However, having in mind the tendency of heteronormative constrains to limit personal choice and reduce the freedom of deciding about personal identity, we will consider it to be negative phenomena. Further, heteronormativity and hyper masculinization, having aggression, violence and war as both causes and consequences, might be seen as negative *a priori*.

In the context of informal learning, which is more influenced by personal choices and private life, regression creates resistance that limits the choices that a person makes to a large extent. Illeris (2013b) describes how it happens:

It is also important to be aware that all learning, and especially demanding learning, very often will have to overcome learning barriers in the form of defence or resistance. In liquid modernity we are all confronted with so many new situations and learning possibilities that we have to protect ourselves against being overwhelmed and destabilized by constant change. We therefore develop a learning defence which is partly unconscious and automatic. We cannot take in all learning possibilities, and not even overcome to consciously decide which to take in and which to refuse (cf. Illeris, 2007). A very strong part of this defence system is the identity defence, which actually protects us against too much transformative learning, which could result in some kind of instability.

#### METHODOLOGICAL FRAMEWORK

We analyse whether the crisis situations (war, poverty, uncertainty) caused the type of regressive transformative learning, which (under these circumstances) led to the new (but essentially traditional) perception of gender roles, which again caused the resistance to the other types of learning – the ones which oppose heteronormative identity. A related research question was: How might gender identity be related to resistances towards content and goals of individuals learning projects? Gender-related resistance will be regarded as a resistance that is the result of previous informal learning, more specifically as its heteronormative aspect. We will look specifically at how the crisis situation during the 1990’s in Serbia influenced the development of and strengthened “hyper masculinity”. This phenomenon has been confirmed and reinforced through demasculinization of other men labelled as “gender traitors” or “gender misfits”. The basic research hypothesis is not only whether created “macho” identity tends to be preserved through various learning practices, but also whether

there is a resistance towards re-experiencing demasculinization through engagement in practice that are seen as predominately female.

The methodology used is discourse analysis, because of the importance of implicit assumptions that are perceived as truth by research participants. Since we are dealing with a topic that is very sensitive, we also wanted to create space for the voices of participants to be heard and acknowledged. For that reason we will also approach data analysis by using premises of *phenomenological* research methodologies in order to offer to readers lived experiences of research participants.

Semi-structured interviews, having some elements of *psychoanalytic interviews*, were conducted with four male participants, age 25 to 35 years. Questions were related to their learning activities, but also to their experiences in the period of adolescence. Since the interview provoked experiences of bullying and mistreatment, it was crucial to create a safe atmosphere during conversations.

The *interpretation of meaning* was also in place, since an essential aspect of psychoanalytical technique is the interpretation of the meaning of the patient's statements and actions. The psychoanalytical interpretations are open to ambiguity and contradictions as they address multiple layers of meanings.

#### DATA ANALYSIS AND INTERPRETATION

The interpretation will follow two lines: resistance caused by imposed gender roles related to content of learning, goals, organizational forms, and the mechanisms of creating them. We wanted to shed light on experiences that were mainly unspoken and create space for male identity expansion by allowing stories to be told and heard. By talking about their experiences of school years, participants exposed their role of victim, which is something that they do not often talked about. This was important for the understanding of heteronormativity as a creator of the "social mask", where both genders are victims, since identity has the strict constraints, and self has to "fit in" with social patterns.

During the 90's, heteronormativity reached its extreme in a way that the gap between male and female roles increased, and macho men became the ideal of a man. Gender dichotomy increases since defence and fight are perceived as a part of male role, and reproduction as a female duty (Klein, 1999). The desirable macho identity was promoted and shaped by hybrid discourses. Patriarchal discourse that had been weakened during socialist period in Yugoslavia was re-strengthened and re-constructed by the influence of military discourse. According to Reardon, militarism "manifests the excesses of those characteristics generally referred to as machismo, a term that originally connoted the strength, bravery and responsibility necessary to fulfil male social functions" (1985, p. 14). Boys were part of various discursive practices that were modelled according to the rules of military organization. Strong and rigid hierarchy was promoted and violence was practiced in order to maintain desirable systems. Klein (1999) called this kind of society *military society* and offered several indicators that should be investigated in order to evaluate the influence of the military



on the construction of masculinity. Elements of military socialization are found in the participants' responses: military language (*you are in command*) devaluation of what is regarded as being female, male bonding, drilling and rituals of subjugation (*If you refuse to fight then you are sissy. It is macho not to have a girlfriend and to fight*). The author further argues that the dominance of military discourse leads to gender inequality in society, but we believe that patriarchal discourse in its extreme form victimized males as well as females. Victimization of men was not a prevailing topic since being a victim is not a desirable characteristic of male identity in military-patriarchal discourses. The incompatibility between this understanding of masculinity and victimization occurs both at the level of the attack itself – a man should have been able to prevent himself from being attacked – and in dealing with the consequences of the attack – to be able to cope “like a man”. Further on, Jones points out:

- (1) Militarized expressions of violence act to buttress hegemonic masculinity;
- (2) This violence is likely to take the most extreme forms, reflecting the violence in extremis that is genocide and war;
- (3) Hegemonic masculinity is competitive and seeks to emerge victorious; it is always buttressed in its hegemony by victory, and the vanquished male foe is frequently feminized by virtue of his defeat. (2006, p. 457)

In the following participant's response, there is an evidence of subjugation and mistreatment that had strong sexual connotations:

A macho guy needs to fight those snotty, to mistreat them (laughing). They bullied them. Force them to do push-ups. Not to beat them, but do push-ups, to f... goalpost. That's what we always did, we had to do. You meet the main honcho, and he says: “Now, come one, f... the goalpost.” Then you f... the goalpost, and he was walking with a girl, laughing. Or say you're a harmonica, trumpet you, you sing, he walks with chick, we follow him and each plays his instrument. Or kissing with your male friend, or go into the garbage container.

The example given seems to be almost the ideal type illustration of heternormative disciplinisation in several ways. Men that are seen as the ones that do not follow the standards of proper men (machos), are often perceived as being weak or *snotty*, as stated by the participant. Further on, they seem to represent a negative reference group to acknowledged machos, and in the same time those who are put under treatment of humiliation for failing to be closer to the ideal of man. Kimmel (2001) stressed the inequalities of male identities. Accordingly, there is always one standard of male identity which serves as a measure for other male identities to be evaluated and measured – hegemonic masculinity. Hooper (2001) noticed that the feminized male “other” is central for the modern masculinity construct. According to her, it represents an instrument for maintenance of the hierarchy of masculinities. This feminization of “other” men, which we call demasculinization, is used not only to maintain conformity within the group, but also to differentiate between standard, hegemonic, and subordinate men.



It follows that those males adopting subordinate masculinities, or having such masculinities thrust on them by the bearers of hegemonic masculinity, are likely to be disciplined and punished for their failure to fulfil hegemonic demands and expectations. The strategies used in this pursuit tend to begin very early in life and are familiar to most of us from everyday observation. The relentless hounding of perceived “geeks,” “faggots,” “pansies,” “wimps,” and the like in schoolyards worldwide may, in adolescence and adulthood, lead to vicious assaults and even killings of those who do not measure up. (Jones, 2006, p. 453)

Another participant talked as well extensively about the 90’s context and macho and subordinated male identities:

The beatings were the easy part. The most stressing situations were those in which people would draw knives, guns and bombs. They did not throw those, just bragged about it. And those were, so to say, little idlers. One had to fear when going through his own hood. That was everywhere in every neighbourhood. Those guys would come back from the battlefields, and act as important figures. We were kids back then and had to respect them.

In the 1990’s wartime in Serbia these phenomena became more extreme in socialization of young men, and this example supports that view. A man who is to become a “proper”, tough man, as a part of a learning process, needs to move his identity more to the male end of the heteronormative continuum, not only affirmatively, by acting and reasoning more like a desired standard, but also, negatively and in a discriminatory manner. More precisely, he needs to be engaged in a role in which he becomes a conductor of a disciplinisation process by mistreating nonstandard, subordinate men (Hooper, 2001) or a gender misfit of some kind (e.g. *...macho guy needs to fight those snotty, to mistreat them. That’s what we always did, we had to do*). This type of socialization in domain of identity building and practice is not a modern invention. It may represent a milder form of practice that existed in warrior societies. For, example, in Spartan society, a *krypteia* was allegedly a part of education of men (Cartledge, 2002). The most capable young Spartan men were allowed, through practice of *krypteia*, to prove their worth, by killing helots (Spartan slave like workers) without any social penalty or juridical repercussion. We hypothesize that the modern equivalent is similar in its function – proving oneself to be worthy of belonging to a tough male, dominant, macho, combat man identity. But not only that, we think, in its essence, this socialization process (combat men identity building through demasculinization of others, Jones, 2006) is achieved through several sub-mechanisms. First, a man shows his toughness through a lack of empathy and spreading his power by achieving greater influence over others. Secondly, by picking someone to bully, he becomes a favourite, the agent of heteronormativity, therefore, closer to the heteronormative ideal by being the conductor of the process himself. And lastly, a man starts to build the negative reference to a mistreated misfit, which subjectively and negatively, brings him closer to a macho-warrior identity that was fashioned in the military society.

We linked interpretation of given responses with participants' current educational needs and desires, as well as resistances toward certain types of learning. We came to our conclusions by drawing on the psychoanalytic concept of resistance, by interpreting their present choices by past difficult experiences, but paying more attention to identity creation and therefore analysing the role of dominant discourses (Hughes, 2000).

One participant reported more precisely about the content of informal learning related to gender identity. It was military and war related history:

Vikings were interesting to me because they were explorers and seamen [...], they set out to conquer of Europe, and they stole, robed and spread their culture [...]

as well as an interest in arts:

I had a passion that died off. I liked to draw and was appreciated for it. That interest was directed towards comic books, but I hit a wall in the form of one academic, a painter, who upon looking of my work, stated that I need to work much more hard. I use to be fulfilled by drawing, but am interested in some other things now.

Again, one can see how a patriarchal culture influenced socialization and the direction of informal learning, especially during 90's. The participant was interested in war/military society of Vikings, and went through a process of self-directed learning about it. Why Vikings, one could ask? Might this congruence of his interests in society of powerful and hegemonic males – Vikings with socialization demands and ideals of Serbian society during the 90' – be a coincidence? We believe that this example shows how a person chooses learning contents that are likely to support his or her gender identity. Here, the identity itself represents a mediator between demands of the patriarchal narrative and a person's interest in particular content. The participant also claimed to be interested in drawing art but did not continue to invest further into it upon receiving a negatively perceived comments from an academic, who happened to be an older and superior man in the field of the art. One can see how importantly marked and fatal for the participant this critique was perceived when given by a man positioned more highly in a patriarchal hierarchy.

This participant also described his most important interest of informal learning. It was about the opposite sex:

I would like to figure out how female's brain functions and how to make my girlfriend feel desired. To figure out what turns her on and to press those buttons (simultaneously he taps the table). And if she feels with me something she did not feel before, I can consider my goal to be fulfilled. It would mean that I found some spots that she did not feel with some other idiots before me. So I am a next lion in the herd, the one who is to be a new lion and who is to

open her eyes in a slightly different way. She will not have harnesses like a horse and she will broaden her perspectives.

Patriarchal male identity emerges in these depictions in several ways. A male identity is seen as dominant, a man who knows the “lore” of women, who can “figure out her brain” and “press the buttons”. A woman is seen as passive in the process, and one who needs to be dominated in subtle manner, through the art of seduction and pleasing. Also, a woman is the one that needs intervention from the man in order to “broaden her perspective”. She needs a man in order to comprehend the world more clearly (*So I am a next lion in the herd, the one who is to be a new lion and who is to open her eyes in a slightly different way. She will not have harnesses like a horse and she will broaden her perspectives.*), but she needs not just any kind of male, but the “lion”, an ultimate, the best kind of a man.

It is important to see here another aspect of ideal male identity, or maybe even different ideals of male identity. This type of man becomes a patriarchal gender ideal, not by being aggressive, militaristic, hegemonic male as in previous examples, but through knowing and benevolent influence over women. A man is a saviour who needs to please and enlighten (rescue) passive and less capable women.

Another participant gave us an opportunity to reflect deeper about resistance towards goals and contents of learning:

I just was not attracted to dance. I do not know. Not because it's a male female thing, but emotion that is expressed, for example in tango – derisively. It somehow, I don't know, so to share emotions with someone somehow was not appealing to me. Maybe I'm wrong. One friend explained that to me and I have realized that I am not interested. It is really repulsive, that situation, you go there on purpose, you dress up, and then you wait; people choose each other, you watch it, then you share emotions through dancing. I mean that public sharing of emotions. That is a little bit... I just do not feel comfortable with it... And with workshops, it is the same thing. I mean, probably, it would be useful for me, but it would take a lot of time for me to... to cross the threshold to be open.

In this example the participant manifested stereotypical macho attitudes towards dancing the tango. In addition, it was clearly stated that this resistance was not a result of inner conflict – a wish to dance on the one hand, and a fear of perceived temporary loss of masculinity on the other, that is self demasculinization. It is experienced as a loss of desire to even attempt the act of dancing. We presume that if this lack of desire, to dance for example, is present in so many so called ‘macho men’, it would be a clear sign that the act which is typically attributed to female gender roles is deeply internalized, so much that it became an authentic loss of desire.

There is an assumption behind this utterance that sharing emotions in a public space is an uncomfortable act. The participant does not categorize dance according to gender divisions, but he emphasizes unpleasantness of showing emotions. Prohibition on public vulnerability can be interpreted as the heritage of patriarchal

thought. Manifesting emotions means being feminized. We will interpret his resistance towards dancing by his past experiences that were related to social pressure to be heroic and courageous:

But you know when you are really fucked up. If you get arrested with couple of your mates, and you all did some shit and coppers start to maltreating you, because they were beaten and mistreating kids, and you start to cry and whine that can bury you bro'. If it hurts, and then you cry, you are a wuss as well.

Because I had great ambitions about water polo at the time. I got to love that sport so much that I use to cry almost every other night. It hurt me because I was not able to train water polo any more. I would go to my bedroom because I could not tell that to my parents, they would not understand. And I would cry my tears out, and tomorrow a new day would come, and I would remind myself about it (water polo) in the evening and it would start to hurt again, because there would be no one else to hear me. There would be no one to show understanding. And that is difficult. Especially when your parents tell you, 'there, there' and tap you on the shoulder or trainers who are undereducated and they caused it (sport injury). And then, you get to question yourself.

The one who would show emotions in fight was consider being "pussy" or "sissy" and would lose respect of the group. Emotions were allowed only to girls. This is an obvious consequence of patriarchal thought. "It is the 'objective', emotionless, 'scientific' and religious discourse on which Western civilization has been built" (Reis, 1995, p. 183). But it has been brought to the end of the continuum; man is not the one who is only rational and strong. Rather, it is an angry person who is ready to fight when needed. Expressing weakness was girly and it would cause serious trouble. To cry is to come close to a dangerous line that can turn a man into a "wussy".

All of the participants interviewed, although having very different personalities and different lifestyles, seem to refer to a same process that shaped them as who they are and who they even wished to be. It is the specific aspect of socialization and heteronormativity, "reserved" for men only, that in some contexts, as in the one we referred to, may become increasingly strong in its main function devoted to cleaning of "femininity" from proper men, and adding some to those less standard ones. It shapes the identity of a person, by selecting what, how, and from whom to learn, as well as when not to learn at all.

## CONCLUSIONS

According to participants' responses and our analysis, we argue that various aspects of informal learning are created and chosen according to heteronormative rules. All aspects and kinds of learning are very much exposed to gender definitions and understanding, in more or less visible ways. Although we are not always aware

of that, through our usual activities we are trying to validate ourselves as women or men and striving to prove the value of certain biological trait acquired by birth (Zaharijević, 2010), even in private spaces of informal learning, traditional dualistic discourses of clearly defined male and female identities continue to operate and to influence choices, or create resistance toward practices that do not fit heterosexual standards. This is true for many aspects of non-formal and informal learning – aims, wishes and striving guiding people when he/she makes choices, organisational forms and methods chosen, content of learning, its later application, and many others.

More generally, we see demasculinization as a more specific form of a heteronormative process, disciplinisation mechanism that operates within a continuum with opposite polarities (male and female norms). The heteronormative characteristic of the continuum serves as a sort of “differential increaser”, pushing the social perception of actual gender identities more to the opposite ends of continuum. Due to this process, male gender misfits are, if not successfully disciplined, simply thrust away more from the male to the female end of the continuum in order not to jeopardize the male opposite (norm), which, as a socially constructed product, needs to be maintained and looked after. Simultaneously, by pointing out to a gender traitor, those who serve as agencies of the process – “proper men”, benefit from it, feeling more secure and being *additionally* routed in fixed male norms, most likely because of the status (and related power) gained from simply being the conductors of the process. The one that serves the god of socialization deserves himself/herself to be awarded by being more socialized, and therefore gains higher status on the social desirability ladder. Of course, a male norm is relative and changeable over different places and time, cultures and generations, but what is universal, tends to be this mechanism that is increasing and fixing gender identity differences.

At the beginning we stated that we were approaching the problem of gender identity from a position of social constructivism. Having that in mind, it seems that informal learning (including socialization) is the process which could explain how this construct comes to life. In the case of gender identity building of young men, a peer group becomes one of the most dominant agents of socialization. An adolescent group becomes a group of actors in a play with prefixed and more or less desirable roles such are: macho, sissy, nerd, etc. Heteronormativity and disciplinization are emerging as main plot concepts in this drama of socialization, and the process of acting is nothing less than learning itself. Using these examples and analyses we conclude that gender identity is partially built through informal learning in formative years. Later during the adulthood, this created identity, being more or less rigid (depending on a strength of previous learning), acts as a selective filter which influences what, how, when and with/from whom one learns. It has learning for its source but also creates its outcome. Of course, it is only one of the factors that influence choices of learning, but as described previously, can be extremely powerful as it is one of the most basic identities a person can have. It can push learning forward or build a resistance. Which one will take place, depends not only on the desirability of a specific form or content of learning, but also on the rigidity of the identity filter. This

opens a new issue concerning transformative learning and raises several questions – whether and how learning can change the filter, under which circumstances could it become regressive, and how this regressive learning changes the way we choose (not) to learn, in the framework of our identity development.

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*Katarina Popović*  
*Faculty of Philosophy*  
*University of Belgrade*  
*Serbia*

*Maja Maksimović*  
*Faculty of Philosophy*  
*University of Belgrade*  
*Serbia*

*Aleksandar Bulajić*  
*Faculty of Philosophy*  
*University of Belgrade*  
*Serbia*



### 3. (L)EARNING POWER

#### *Gender and Power Based on the Commitment to Marital Relation*

Power in marriage depends on the social and cultural norms regarding gender roles and expectations addressed to spouses and families. In European societies men are culturally provided with family power, and are called “heads of families”, but together with an increase in the level of economic development power granted to women grows. Such a scheme of power relations is transmitted both in the process of socialization, and gained by women and men in the process of learning, understood as active and social behavior in which meanings are created in order to better understand the reality. Those meanings are formed *inter alia* through interactions with others (Bron, 2006). In this perspective, marital relation becomes one of the space of learning, including learning and negotiating power.

#### GENDER AND THE SOCIALIZATION TO POWER

In the process of socialization children learn the basic principles of power and social influence. Initially this learning is through the family, but later through other social institutions such as school, peer groups, through work and in public life. A family, as the basic context of power, is also a place where the groundwork is prepared for future close, intimate relationships and all other relationships based on power. Children observe who has power, how a person behaves when he/she has it or when he/she comes under it. Lips (1991) lists three principles of power, which are gained in the process of socialization and informal learning. Children learn that power:

1. *is transmitted socially*, sometimes against the rules of logic and in a very arbitrary way; they learn that some people are more important than others, such as adults being more important than children, and men than women.
2. *may be the result of negotiations*, and they may be open or hidden; that it is better to cooperate than be in conflict; that it is easier to gain power or to negotiate it when you have some resources, or something to offer.
3. *can be above the law*. They learn that one can experience the submission to other people, or be forced to submit to it even when the power of those people is unjustified; sometimes they learn that it is a “natural” state and should be accepted (Mandal, 2008, pp. 88–89).



The implementation of those principles in private, intimate relationships has its own gender specific. In the process of socialization women and men are prepared to perform certain social roles based on gender: they acquire a variety of patterns of private relationships as well as learn their place and ways of functioning according to gender. Women are taught in society to focus on private relationships and on the roles of a wife and a mother; in stereotypical terms, to be feminine it means being gentle, sensitive, staying at home and taking care of children. To be male it means being independent, competent, self-confident, demonstrating initiative and being the head of a family, including making a family feel safety and providing with money to survive (Strykowska, 1992, pp. 14–15).

The process of differentiation and activation of different behaviors as well as development of different characteristics regarding gender starts and runs mostly in a family. Daughters are taken care very carefully: they experience more indulgence and understanding; they are allowed more often to express their feelings; they care more about their appearance; they are also more limited in going out (Ostrouch, 2004). *Stereotypical womens' socialization* connected with the formation of attitudes of care, sensitivity to the needs of others and sacrifice, promotes the development of passivity, submissiveness and subordination, *akin to attitudes specific to the role of a victim*.

The universality of the traditional family model, in which a woman is mostly engaged in household duties and taking care of dependent people – mostly children, delays the development of women's social and professional activities. This kind of family model is connected with historically and culturally grounded men's power. Unfortunately, a silent approval or impassivity of other family members, neighbours, managers and co-workers or institutions towards physical and psychological violence used by men against women and children is a strong consequence of that connection. Research shows that women who stay at home and are not professionally active quickly become victims of violence from their husbands, especially psychological and economic violence (Duch-Krzysztozek, 2007, pp. 223–234).

In case of sons the situation is slightly different. Parents are more willing to tolerate competitive attitudes and aggressive behaviour, particularly physical aggression. Aggression is often the only emotion openly expressed by fathers, and observed by their sons (Eichelberger, 1998). Emotional and physical distance, rigour and the use of punishments, including physical ones, are included in paternity models and relationships with children, especially with sons. In traditional, patriarchal family models, respect and admiration, sometimes with fear, are above all the basic feelings that should be shown by a child to a father (Oleś, 2000). Traditional stereotypes of “pure masculinity” and the social order of being an authority for children generates many problems and difficulties in building open and intimate relationships, especially between a father and a son; a relationship, which is made more difficult by authoritarianism, egoism and violence (Biddulph, 2003).

It also includes positive reactions of parents when boys are successful and “victorious” and avoidance of the the label “loser”. It should be emphasised that girls do not receive such labels as quickly as boys in case of failure (Goldberg, 1979). Though early socialization experiences boys learn to express assertive attitudes, without emotion, except when they express anger. They are not allowed to express any sign of weakness or intimacy. They are stimulated to be active, to develop a sense of competence and to control their emotions. They are taught how to develop the feature and attitudes related to leadership training. They are taught self-sufficiency and encouraged to make an effort to expand the boundaries of their abilities. Traditional male socialization is focused on developing their self-control and dominance (Golczyńska-Grondas, 2004; Biddulph, 2003). The analysis of existing research clearly shows that *the traditional socialization and male stereotypes* (physical strength, emotional coldness, tendency towards aggression, risky behaviour and domination), *the traditional pattern of paternity* (focusing on the role of breadwinner, physical and emotional absence, authoritarianism) as well as *stereotypical pattern of father – son relationship* (“reasonable” authoritarianism, consent to inflict severe punishment on boys) *are factors encouraging men to adopt behaviors specific to the role of a perpetrator of violence, through having power* (Chmura-Rutkowska & Ostrouch, 2007).

All of these powerful socialization messages play an extremely important role in the genesis and duration of private relationships; they include *intellectual training*, connected with the development of intellectual differences between men and women, *emotional training* – indicating different expression and strength of emotions regarding gender, and *social training* – consisting of learning a gendered place in society (Mandal, 2000, p. 38). What should be emphasised here is the wider context of those messages connected with progressive individualization of human life, collapse of state-sanctioned “normal” biographies, role models, including those related to gender (Beck, 1992). It also extends in Poland and the countries of Central and Eastern Europe to the transformation of political and economic systems and socio-cultural change. Stereotypically-shaped women and men, who want to use the potential of change that brings them a new socio-cultural reality, and who try to create different private relationships from their families of origin, are typically forced to work out and to learn new rules regulating their relations. That also applies to the sphere of power in marriage.

#### GENDER AND POWER IN PRIVATE RELATIONSHIPS

Power is a fundamental and omnipresent phenomenon in society; it exists also in private relationships. Today, in the discourse of psychology power, it is defined as “the ability to influence others and to control them, the ability to make other person do what we want, even though internal resistance” (Mandal, 2008, p. 29). However power can be also defined in relation to the commitment and resources available to spouses. In this case, it can be understood as “the ability to change the condition of

other people by being able to supply or withdraw resources” (Ibidem). Thus, power in close, intimate relationships may be defined as:

- the ability of a person to make requirements of another person and execute them,
- the ability to carry out one’s own will, even in the case of resistance from another person,
- the control of important resources.

Mandal (2008, p. 80) argues that power in private relationships is characterized by certain, key features. Several of the features of power the author mentions include its:

- *relational nature* – power refers more to the characteristics of the relationship itself rather than to the characteristics of the individual;
- *dynamics and variability* – power is not static;
- *connection with the asymmetry in relationships* – power is often connected with predominance of one person over the other, but the power in one sphere may be compensated by the opposite situation in other spheres, so the general correlation can be symmetrical;
- *multidimensionality* – power contains individual elements (e.g., intellectual level, needs, values, etc.), interactive ones (who makes key decisions and who decides about the methods of their implementation, therefore the strategic and executive level of power) and socio-cultural ones (social expectations towards women and men).

These features are specific to power in private, intimate relations, which being a kind of social power, is significantly different from power in professional or political organizations, mainly because of its relational nature (Neçki, 1990).

In the analyses of different power systems in private relations, there are two types of power (Mandal, 2008). The first type is based on *exaction* privileges, resulting from domination over a spouse, making him/her addicted to him/her. The second type of power is based on the *commitment* to relationship, resulting from the preferred system of values, self-esteem and respect for a spouse as a person. The second type of power resembles the “*good*” power as defined by Janeway (1981), which is power that allows people to achieve goals (as opposed to “*bad*” power, the essence of which involves dominance over others). Janeway emphasizes that in democratic structures and relations, including in marital ones, there should be no space for constant leadership by one partner, and also the fixed power of men over women. However, in western culture the possession or acquiring power by women as the ones mostly subordinated to the power of the family, requires the initiation and implementation of processes of “empowerment”, which means providing possibilities for people without power to act, and promoting gender equality so as both genders are freely able to achieve their own goals and benefit from them.

The above mentioned type of power based on the commitment to relationship is usually observed in egalitarian marriages, which are based on the principles of

equality, justice, freedom and openness, and that type of power is in the centre of my presentation.

In egalitarian relationships, if there is equal relationships regarding financial power, it is positively related to perceived satisfaction in relationship and there is less tendency of wives and husbands to use different social influence tactics (Mandal, 2008, p. 69). If such tactics occur, they are usually based on bargaining, as shown in the study by Howard, Blumstein and Schwartz (1986). Thus the choice of an egalitarian idea of a private relationship largely determines the choice of *bargaining/negotiating technique*, as justifying, endeavoring to a compromise and to offer an agreement, as the lead technique in the context of gender and power in private, intimate relationships.

At present, regarding the power between spouses in a family, the importance of individual factors such as education or professional activity is also stressed. In dual-career families, highly educated women have prestigious and well-paid jobs. Despite the fact that patriarchal culture does not provide women with power in private relationships, but today thanks to their education and financial independence, they have a similar chance to gain power in marriage as men to whom power is “given” as determined via the dominant gender stereotypes. However, the issue of power in egalitarian marriage is still an unrecognized sphere, especially in the context of changing gender roles and patterns in a family. Therefore I wanted to know via research how power based on the commitment to marital relations is constructed and achieved in everyday life. I derived answers to that question from the analysis of support strategies received and given by each of the spouses in the proces of achieving individual career goals as well as in achieving a common goal, which is the harmonious functioning of their marriage and family.

#### CONTEXT OF MY OWN RESEARCH

The main aim of my biographical research (Ostrouch-Kamińska, 2011) was to find answers to questions about how egalitarian relations between men and women are built in everyday life, how it becomes an individual biographical project; how the process of negotiations of everyday family life and relations proceed, and also what are the ways in which people achieve it. My intention was to understand and interpret the phenomenon of equality between spouses. I wanted to grasp the different meanings of egalitarian everyday family life as manifested by different narrators.

During several meetings I interviewed dual-career families: separately women and men, who were between 32 and 47 years old, professionally active, highly educated, who had been in a relationship for a minimum of three years, had children and lived with them. Issues raised in the interviews related to: biographical experiences of the family of origin, the meanings attributed to professional work, the ways of understanding and interpreting the phenomenon of gender equality, strategies of division of daily chores, reconciliation of work and family life, and the

meanings attributed to parental and intimate relations. I referred to the foundations of phenomenology of the family (Klein & White, 1996, pp. 106–109) in order to reach a reflective insight into inter-subjective family experiences.

#### SUPPORT STRATEGIES OF A SPOUSE AS AN EXAMPLE OF EARNING POWER BASED ON THE COMMITMENT TO MARITAL RELATION

The interviewees are seen as examples of active employees, focused on their development and achieving personal goals, for whom professional work is an extremely important sphere in life; important for both men and women, who even if they could stay at home and stop working, they would not do it. In fact work is one of central sources of women's self-concept, an inexhaustible source of self-esteem and dignity, building or increasing the feeling of being a partner in marital relations. Work and earned wages are not goals in themselves, but are means of achieving the specific vision of women's lives and "speaking in their own voices" - becoming a subject, a person, an individual.

For men professional involvement is a key component of their male role and the basis of a sense of personal agency. The income and self-esteem accumulated on the basis of earning money is the main source of male self-concept in relation to marital relations. The meaning of work revealed in narratives vary by narrator's gender. For women it is *a source of empowerment and liberation from traditionally assigned roles*. For men it is *a source of realizing the role of breadwinner, according to the traditional, male gender identity*.

The label "support" was revealed as a dominant category in narrations about spouses' work. Among the revealed strategies of support there is a triad of emotional support, and support strategies related to attitudes towards professional careers of the spouse as well as sharing chores and organizing the day. The first three strategies are called:

- "mutual interest and attention"
- "open communication", and
- "acceptance"

Interviewees who emphasized a high level of communication in their relationships regarding professional work and the career of both spouses often expressed a belief in their husbands' interest in women's professional role, their achievements, difficulties and plans. Because of this, they often had a greater sense of understanding, support and acceptance of women's choices:

I even have the impression that he is too burden by me. (...) We talk about it constantly – about my well-being, my self-esteem at work, what would change, about my problems. (III/7/Woman)

That sense has a positive effect on their self-esteem, self-acceptance in their role and declared general satisfaction of life. A sense of compassion and community in what they do was also very significant.

Open communication and interest in the field of professional activities were also what other women missed the most; much more than the possibility of a more balanced division of daily chores. They expressed a longing for acceptance of their actions by their husbands; they wanted them to be proud of them, and they were able to talk to them about those emotions. That openness in communication was also connected with the ability to express husbands' acceptance, particularly of wives' professional successes.

A specific type of support system that I call "a system of appearance" was to provide the wife with a full understanding of the specifics of her work, accompanied by husband's admiration for her ability to reconcile the many spheres of her life at the same time. However, that understanding did extend to support shown to his wife in daily family tasks and chores, and into interest in her professional career:

He understands everything but it does not give rise to his reflection.  
(V/9/Woman)

The other two support strategies were connected with attitudes towards a spouse's career and the organization of everyday life. The first strategy was called "the strategy of 'lack of resistance' to spouse's self-development and career involvement". Interviewees – men had more problems with providing their wives with emotional support, but underlined that they told their wives nice words and compliments regarding their work successes. However, it seems that the greatest possible men's support offered to their wives, and simultaneously the biggest approval of their professional role, was the lack of objections to wife's development and her involvement in career:

As she must go somewhere, she goes. I do not make any remarks or coimplaints about that. But I know that there are colleagues at her work who make nasty remarks to their wives that they are not at home. (IV/6/Man)

This strategy of support was also emphasized by women and treated by them as real support received from their husbands. The fact that both women and men indicated husbands' acceptance showed to wives through lack of their resistance causes that this strategy seems to be one of the most frequently used strategies in interviewed marriages.

The second strategy of support offered mutually by the spouses was "the strategy of 'providing time'". It was connected with the dynamics of mutual sharing and taking over chores as well as looking after children by spouses, regulated by the level of involvement of a spouse in professional activities, its duration and the time of appearance. This strategy resembles *a dynamic partnership or equality* in meeting professional challenges:

If I know that I can not do some chores, because I have to go to work, I know for 100% that she will do it. But on the other hand, if she has to leave, or to get involved much more, she knows that I ... will do ... all those duties and chores. (VII/13/M)

It is worth mentioning that this (temporary) taking responsibility for the sphere of family functioning, mostly for childcare, was treated as marital support mainly by men:

My ongoing support is probably then when my wife is overloaded with her work. In such a situation I take care of children and she does not have to worry about anything connected with them. (VIII/ 16/M)

Women emphasized this fact more seldom. The two of them were even so much convinced that childcare and daily chores belong to sphere of women and identified them as “female” that they did not treat their involvement in that sphere as an element of support:

I do not even think that this is my support to my husband. It is obvious to me that when he goes to work, I need to adjust. (V / 9 / K)

The reason for this difference has its roots in stereotypical gender socialization. “Support” was defined by interviewees mostly in terms of specific, additional, specially adressed activity to a spouse. Thus, daily women’s involvement in chores and childcare, being connected with traditional female role, could not be perceived by wives as support. Men treated daily chores as additional activity regarding their culturally defined role, so they not only indicated doing chores and childcare as a support to their wives, but also were able to perceive those activities as a support received from their wives.

Trying to explain deeply the meaning of described marital strategies of support we can refer to the concept of violence known as “coercive control” by Stark (2007), described in the book entitled *Coercive Control: How Men Entrap Women in Personal Life*. The purpose of this form of domestic violence is a deconstruction of being a person. The most important aspect here is not what men *do* to women, but what they *stop* them from doing. Strategies of mutual spouses’ support revealed in narratives, particularly the strategy of ‘lack of resistance’ may indicate the ongoing proces of power negotiations in interviewees’ families, striving for compromise and consensus, as well as the construction of equality from the same level of power in marital relations.

#### CONCLUSIONS: LEARNING POWER BASED ON THE COMMITMENT TO MARITAL RELATION

One of the meanings of work disclosed in narratives was work as the source of marital intimacy/privacy. That meaning was connected with a sense of shared experience, understanding, the perception of the world and other people, and finally reciprocity as a result of professional involvement of both a wife and a husband simultaneously. In the process of building and sharing this intimacy, a key position was occupied by showing interest to a spouse and open communication, also categorized as major strategies of support to a spouse in fulfilling his/her career aspirations.



Results of my research shows women and men's transgression of culturally defined female role, traditionally connected with family experiences and maternity (particularly in Polish culture of strong Mother-Pole pattern) (Ostrouch, 2005), and male role, connected with professional experience, towards the professional emancipation of women and the "domestication" of men. The process of learning and "earning" power based on the commitment to marital relation becomes the process of constructing gender equality in a family, as well as the process of women's empowerment. The abovementioned transgression can be observed only in those marriages in which spouses actively and deeply are engaged in constructing their relationship (Ostrouch-Kamińska, 2012) in the process of informal learning from each other and with each other in interactions in everyday life. The process of (auto)reflection that initiates and deepens self-understanding as a condition of informal learning in relation to a spouse can initiate a real change in female or male identity, and support process of "work on identity", in which the dialogue takes place between *Me* and *I* (Mead, 1975).

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*Joanna Ostrouch-Kamińska*  
*Faculty of Social Sciences*  
*University of Warmia and Mazury*  
*Poland*

## 4. NOT JUST FOR WOMEN

### *Breast Cancer, Gender and Informal Learning in an Exceptional Situation*

#### INFORMAL LEARNING IN THE CONTEXT OF LIFE-THREATENING DISEASE

Within the last 40 years, in adult education, informal learning has received increasing attention. Applying the methods of qualitative research, there are attempts to study learning phenomena in different life situations that are not explicitly characterized by professional educational interventions, such as learning processes at work (Dinkelaker, 2008; Schmidt, 2009), learning processes in aging (Wagner, 2004; Himmelsbach, 2009) or within the context of disease (Griesehop, 2003; Seltrecht, 2006). Different kinds of data (e.g., protocols of participant observations, expert interviews or autobiographical narrative interviews) are evaluated based on basic theories, which are based on different methodologies (e. g., objective hermeneutics, documentary method, Grounded Theory). When carrying out the individual research projects, however, difficulty in defining the beginning of the learning process continually arises: In Germany, the discourse of informal learning in education sciences was mainly initiated by education-policy papers from the 1970s onwards. Terms introduced into the discussion include learning by experience, implicit learning, incidental learning, learning en passant, as well as self-organised, self-determined and self-controlled learning. Each of these terms focuses on particular aspects of informal learning. The maze of definitions thus developed within the context of informal learning over the course of time has led to a situation in which every researcher, prior to undertaking any academic research, has to either re-define the concept of informal learning or to position her-/himself with respect to one of the numerous existing definitions.

Another difficulty in defining informal learning is caused by its differentiation from formal teaching and learning: Possessing pedagogical will or displaying pedagogical actions provided within an institutional frame, arguably alone does not result in learning taking place. The non-availability of human individuals to others and the difficulties of learning processes, i.e. the particularities of pedagogical actions (Giesecke, 2007), characterize “formal learning” in educational contexts as “formal teaching”. Consequently, formal learning may or may not take place within pedagogical contexts. It should be noted here that other professionals are also pedagogically active, an example of these include such professions as, tax advisors (Maier-Gutheil, 2009) or physicians (Seltrecht, 2009b). Due to the resulting

normative blurring of pedagogical boundaries (Grunert & Krüger, 2003), it has become increasingly difficult to differentiate between informal and formal learning processes. For this reason, the categories related to education policy informal learning and formal learning were complemented by the differentiating terms pedagogically intended learning processes and pedagogically unintended learning processes (cf. Seltrecht, 2012).

Apart from the described difficulties regarding a uniform definition of the term informal learning, it can also be noted that, so far, little is known about informal learning processes in the context of life-threatening diseases: at present, educational scientists know very little about informal learning processes of people with life-threatening diseases, e.g. breast cancer. Learning has always been viewed positively – not least because of the education-policy debate on lifelong learning. Appropriation of knowledge, changes in daily routine and even changes in identity have always been considered positive developments in individuals. Learning processes related to the finiteness of life, or to dying, or to the acceptance of the fact that not every development and change is in one's own hands have rarely been investigated.

But what about learning processes in the context of life-threatening diseases? Do informal learning processes take place in the context of disease or illness trajectories? Based on the assumption that a life-threatening disease leads to further learning processes, the research project “Disease as a teacher?” (Seltrecht, 2006) examined breast cancer patient biographies under the aspect of learning. In this project, categories were established but used rather vaguely. They were, therefore, verified and differentiated in the follow-up research project “Lifelong learning in the context of life-threatening diseases” (cf. Nittel & Seltrecht, 2013). The following central categories now represent the pillars of the distinction pattern of lifelong learning (cf. Nittel & Seltrecht, 2013):

- learning dimensions (appropriation of knowledge, modification of self-established theories, change of attitudes, change of identity),
- learning contexts (pedagogically intended learning, pedagogically unintended learning),
- learning modes (new learning, relearning, non-learning) and
- learning strategies (strategy of adaptation, strategy of comparison, strategy of searching for something new, strategy of reflection).

As shown by the evaluation of 20 biographies of women with breast cancer, first, a process of appropriating the disease needs to take place before the described learning processes can begin. Appropriating the disease takes place across several phases: Usually, the appropriation process begins with the medical diagnosis of breast cancer. The affected women receive the diagnosis from the attending physician, since only he or she can establish the medical categorization of symptoms or pain. In most cases, the physician's diagnosis is not doubted; however, at first, many women find it impossible to believe: In the beginning, “having cancer” is a characterization that seems strange if applied to oneself. This external characterization of oneself

frequently causes anxieties due to the existing knowledge of mortality rates. Although the affected women now know the disease by name, they do not know the consequences it may have for their present life situation or their future. There is a difference between knowledge and experience: Although the women have appropriated the knowledge regarding the diagnosis, they cannot make use of an existing experience of having had breast cancer. Based on the knowledge they had before, that was given to them by the physician, or investigated on their own, cognitive appropriation of the disease slowly begins. Accordingly women are in a position to say “I have cancer”. During the further course of treatment, depending on the type of therapy they receive, and how it is assessed on a subjective level, massive physical and psychological trajectories of suffering can take place. These trajectories – from nausea, vomiting, loss of breasts and hair, to the fear of losing existing roles or even the life they had led – turn the disease into physical and emotional reality. The self-positioning of “having cancer” now represents the physical and emotional appropriation of the disease. Upon completion of medical treatment and with a good prognosis provided by the physician, the affected women frequently consider their disease as something they have left behind themselves. Then, their self-positioning is characterized by “had cancer”. In some women, a pattern of differentiation also develops: In appropriating the diagnosis, they differentiate between the “world of the affected” and the “world of the non-affected”. This altered way of relating to oneself and the world as part of the identity persists in the long-term. Due to these appropriation and processing phases, the medically defined disease breast cancer turns into one’s own disease breast cancer. At this point, however, the appropriation of knowledge is not something positive and does not – as is frequently associated with learning processes – contribute to the knowledge acquisition of the subjects.

Will the appropriation process of the disease ultimately be of biographical relevance to the women? Looking from the learning-related changes to the biographical changes, the analysis of 20 biographies of women with breast cancer revealed a comprehensive metamorphosis in two of the women. In two other women, a partial biographical metamorphosis was identified. However, no biographical metamorphosis could be seen in 16 women (cf. fig. 1). Nevertheless, the category “no biographical metamorphosis” can be divided into four subcategories: biographical irrelevance, continuity of the life cycle flow and expectation pattern, continuity of the trajectory, and expansion of the trajectory.

*Comprehensive biographical metamorphosis.* A comprehensive biographical metamorphosis in a temporal (not causal) context of breast cancer, the disease takes on the function of an “amplifier”. The disease does not trigger the change process, but causes the continued realization of a metamorphosis that had started before the disease. The theoretical processing of the illness trajectory leads to reflection processes supporting the continued biographical metamorphosis. Calling, “There! Now you’re over it. You’ve had your cancer. Enough!” one of the women (Maria Franz) turned a page, not only on the disease, but also on the life she had been leading

until then. When looking back, she hardly saw any connection to her “former” life. Her future life is characterized by an extension of her options, irrespective of the cancer.

*Partial biographical metamorphosis.* A partial biographical metamorphosis, however, is a partial change in the way a person refers to himself and the world due to the disease. A biographically relevant change of identity takes place, which is exclusively and closely related to the breast cancer disease. For example, one woman (Rita Feuerbach), whose breast had to be amputated, became a model for breast prostheses. With respect to the temporal discontinuity in the case of a partial biographical metamorphosis, it turns out that the “distanced and broken perspective” (Schütze, 1981, p. 108), which, according to Schütze, is characteristic of a biographical metamorphosis, only refers to a partial aspect, namely the aspect of the disease. Compared to the past, the present is only perceived as discontinuous with respect to the breast cancer. The “qualitative leap” (Schütze, 1981) primarily refers to differentiating between the “world of the unaffected” and the “world of the affected”.

*No biographical metamorphosis.* As mentioned, 16 of the 20 biographies do not show any biographical metamorphosis in the context of the breast cancer disease. Nevertheless, these cases can be distinguished from one another.

*No biographical metamorphosis – biographical irrelevance of a cancer disease.* The biographical irrelevance of a cancer disease is characterized by not developing a major illness trajectory during the course of the breast cancer disease. Only the medical treatment adds to the current process structures. The childhood of the women to whom the breast cancer is biographically irrelevant was before World War II. They perceived it as a pleasant period in their lives. When the war began, they were all 14 or 15 years old. The lives of these women are characterized by severe trajectories of suffering that, however, are no longer important at the time of their diagnoses. For instance, during the war, one woman (Antonia Arnulf) experienced the simulation of her own execution. These women, who have experienced such dramatic situations, at the time of the interview, are convinced that their life time is nearly over. The cancer is therefore biographically irrelevant, since it occurred at the end of their life time. The common idea, which is partly shared by medical and psychological specialists, is that a cancer disease represents a culmination within the total of the trajectories. However, the presented study results show that this idea needs to be corrected.

*No biographical metamorphosis – continuity of the life cycle’s flow and expectation pattern.* The subcategory continuity of the life cycle’s flow and expectation pattern describes the group of biographies in which the flow and expectation pattern of the life cycle is dominant before and after the breast cancer. In this subcategory, six of

the 20 cases more or less mirror the standard female biography. These women were content with their lives before they were diagnosed with the disease. The desire or the need to change their life did not exist before they knew they had breast cancer. After completing medical cancer treatment, and overcoming their illness trajectories, it is natural to these women to take up their previous lives. The practical and everyday theoretical processing strategies serve to ensure biographical continuity during the period of discontinuity.

*No biographical metamorphosis – continuity of the trajectory.* The subcategory continuity of the trajectory designates biographies in which a trajectory (e.g. social isolation, unfulfilled desire to have children, unsatisfactory miserable marital relationship) was dominant directly prior to the disease. Following the end of the illness trajectory, or after having achieved a fragile balance, the trajectory that was dominant before the disease once again becomes the dominant process structure in their lives. Thus, it can be stated that the breast cancer did not help to end previously existing trajectories: After the disease, the individual ideas and wishes for a fulfilling life (e.g. social integration, having children of one's own, harmonious marriage) resurface with the same intensity. The cancer neither leads to a review of these wishes, nor to the modification or realization of life plans.

*No biographical metamorphosis – expansion of the trajectory.* The subcategory expansion of the trajectory can be subdivided into two forms: (A) A trajectory can be observed prior to the diagnosis of the disease. In the context of the disease, more trajectory potential is accumulated, which now increases the previously dominant trajectory. (B) Another form of expanding the trajectory occurs if the breast cancer intensifies to such an extent that it results in further complications, such as metastases, leading to an even worse life situation. The process structure that was dominant before the disease is not again (for the time being) the dominant process structure. The trajectories cannot be processed completely by means of practical and everyday theoretical processing.

Figure 1 shows how the individual cases are allocated to the mentioned categories and subcategories.

Against the background of the biographical perspective as a whole, the biographical relevance of having breast cancer during the course of one's life can be seen within a continuum from biographical irrelevance to positive or negative long-term consequences. Apart from physical, mental, social and learning factors, the accumulated biographical experiences play a decisive role in determining the exact position within this continuum. These biographical experiences are partly responsible if not only a process of learning can be observed, but always also a process of relearning (Meyer-Drawe, 2008) or non-learning (not-wanting-to-learn as an active form of non-learning; not-being-able-to-learn as a passive form of non-learning; cf. Seltrecht, 2009a). However, in none of the participating women, evidence of a fundamental biographical change could be determined exclusively

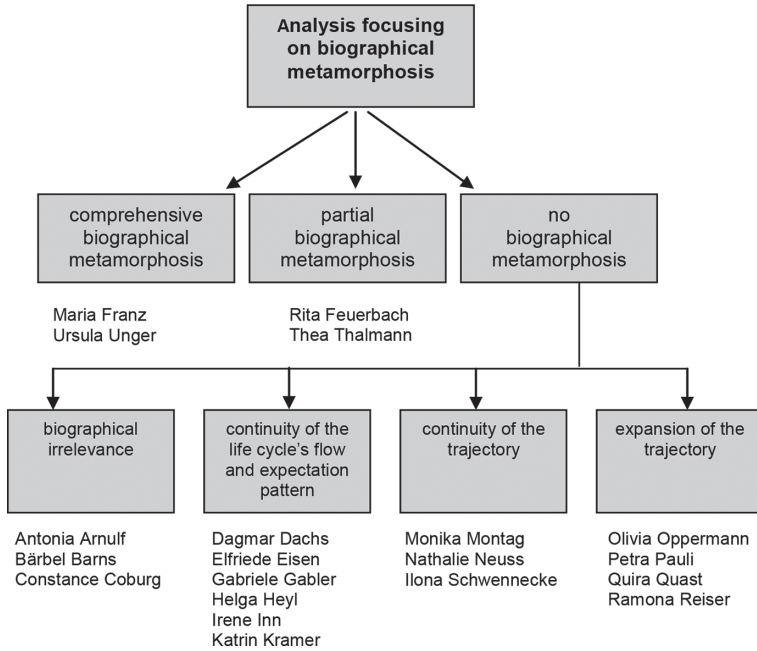


Figure 1. Allocation of all 20 biographies to the categories “comprehensive biographical metamorphosis”, “partial biographical metamorphosis” and “no biographical metamorphosis”.

attributable to their disease – as opposed to what has often been communicated by the media, and also opposed to the assumptions made at the beginning of the research project. Decisive life changes made by the women had always been set before having the disease: in each case, there had been prior serious trajectories that played a role in making decisive life changes.

#### AIMS AND OBJECTIVES

Given that a life-threatening disease represents an exceptional situation in a life, studying the biographies of men with breast cancer means to examine the “exceptional situation within the exceptional situation”. These data provide particularly clear insights into the social construction of gender and the informal learning processes: Men receiving this diagnosis not only have to cope with the fact of a life-threatening disease, but, in addition, have to deal with having acquired a “typical woman’s disease”. This chapter also focuses on the informal appropriation processes required for men to actually go and see a doctor, thus representing the precondition for diagnosing breast cancer (cf. Figure 2).

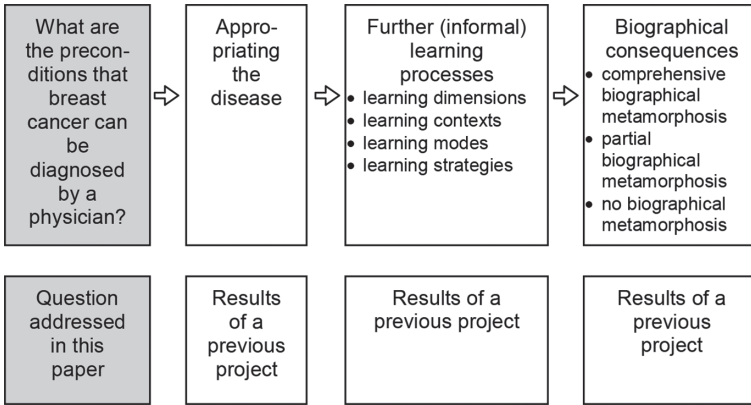


Figure 2. Chronological process of informal appropriation processes.

### PROJECT LINKS

The above mentioned results regarding appropriation processes in the context of breast cancer and the related further learning processes and biographical consequences in women originate from the research project “Disease as a Teacher?” (German: “Lehrmeister Krankheit?”), Seltrecht, 2006). The study examined the questions of how breast cancer is placed within the biographies, what learning phenomena occur, and what consequences the learning phenomena involve regarding the identity or the image of themselves and the world. The study aimed at revealing both the biographical position of the breast cancer disease and the learning processes taking place under the impact of the disease.

The research process of this study is characterized by the biographical analyses and reconstruction of 20 biographies with particular consideration to the circumstances of appropriation. When analyzing biographical material, attention is given not only to “what” the narrator describes, but, particularly, to “how” he or she describes something:

Life history is a narrative “gestalt” that must be envisioned as an ordered sequence of personal experiences, and that orderliness implies the inner development of identity of the biography incumbent. The most important ordering principles of life history are biographical process structures. We can differentiate between four elementary biographical process structures:

- Biographical action schemes by which a person attempts to actively shape the course of their life (...);
- Trajectories of suffering in which persons are no longer capable of actively shaping their own lives, since they can only react to overwhelming outer events; in the course of their suffering, they become strangers to themselves (...);



- Institutional expectation patterns in which persons are following institutionally shaped and normatively defined biographies, e.g. careers in organizations or the family life cycle that opens up family life in the first part of adulthood (...) as well as
- Creative metamorphoses of biographical identity by which a new important inner development begins in one's own biography that might be miraculous and initially irritating, since it is new and that initially prohibits pertinent competencies of the biography incumbent, and she or he must find out what the very quality of it might be (...).
- Biographical process structures normally follow each other in their biographical dominance; the life history of a person can normally be seen as a sequential combination of biographical process structures (Schütze, 2009, p. 11).

Besides the orientation on subjects and courses of life, the adopted research approach is characterized by a holistic perspective, which means that women are not limited to their role as patients but perceived as “whole individuals”, as biography incumbents. This also includes a research approach in which breast cancer as such is not classified as a critical event in life in advance, but in which the affected women give their corresponding assessment.

Based on the study “Disease as a teacher?”, the project “Lifelong learning in the context of life-threatening diseases”, funded by the German Research Foundation (DFG), was carried out from 2009 to 2012 (realization: Dieter Nittel & Astrid Seltrecht). The project aimed at clarifying further research questions on learning in the context of life-threatening diseases. The research design of the project was similar to that of the doctoral project (data collection, data evaluation), but enclosed an additional comparative perspective – that is, both the comparison of two widespread diseases and a gender comparison. In this research, men suffering from breast cancer, and both women and men who had experienced a heart attack were interviewed. The data pool includes a total of 70 autobiographical narrative interviews: 13 interviews from the doctoral project were re-analyzed. Fifty seven life stories were newly collected, mostly in the context of qualification theses (Beteau, 2010; Weise, 2010; Gastrock, 2011; Di Fede, 2011; Pfaff, 2012; Eichhorn, 2012; Aydogdu, 2012; Wiesendanger, 2012).

If, as shown at the beginning, the diagnosis of the disease marks the beginning of its appropriation process, then the question arises which circumstances will lead to seeing a doctor so that the medical diagnosis process may be established. At the same time, from a gender perspective, the question needs to be raised whether there are differences between women and men and, if so, why.

## RESULTS: PRECONDITIONS OF APPROPRIATION OF DISEASE

### *Women with Breast Cancer*

*Seeing a doctor out of bodily concern.* The women sought a doctor because they noticed something unusual happening in their bodies. They felt a lump, tension or

pain in their breasts. One woman, for instance, gave the following account of first perceiving a lump in her breast:

I.I.: With the first [occurrence of the disease – A.S.] I felt/noticed the lump, and it was rather large already. I/I don't like examining myself. I don't like touching myself, (speaks in a low voice) and it was while showering. I felt it then. Soaping and such, you know? (Irene Inn)

Although these women are concerned by their discovery, their reactions were different: Either they immediately made an appointment with a doctor, or they first asked advice from people who were close to them, such as their husbands or female friends. Or, they consulted literature on health issues to compare disease patterns with their own symptoms and then went to the doctor. Their reactions – their concerns and the following visits to their doctors – indicate that an existing everyday knowledge plays a decisive role at this point.

*Seeing a doctor for a routine or screening examination.* A visit to see the doctor may also take place for routine cancer screening for early cancer detection. These women go to see a doctor without having noticed physical changes.

A.A.: At the end of '98, ehm, I went to ehm, Dr. Meier, as, as every year, you know, palpated, didn't find anything. But says: "We are having another mammography done." That was like every three, four years. (Antonia Arnulf)

Women who regularly attend early cancer detection examinations seem to be aware that this is an important measure. However, when looking at their statements in more detail, it becomes apparent that, because the terms "preventive check-up" and "early detection" (which is the correct medical term) are often mistaken as synonyms, some women only understand the term to mean preventive check-up. As a result, the examination is misunderstood: Having this examination done does not mean – against the hope of some women – that one acquires protection against cancer. Regular examinations can only provide early cancer detection, and, thus, may improve the chances of a cure:

R.F.: I didn't think of a lump at all, because I always went to the regular preventive check-up. (Rita Feuerbach)

*Verification of an earlier medical diagnosis, second opinion.* Patients also however see a doctor if they do not agree with the first diagnosis: Either they doubt their doctors' statement that everything is fine, or they want a second opinion on a cancer diagnosis to be completely sure. However, the period of time before seeing a doctor varies.

N.N.: (After the physician had first said: "This is all fine", Nathalie Neuss discovers a lump a short time later) Then, I immediately went to the doctor. (Nathalie Neuss)

R.R.: It always seemed strange to me. But, I always closed my eyes to it, after all, the gynaecologist had said “cyst”. Well, and one day the cyst was ten centimeters and, well, it was a tumour then. (Ramona Reiser)

*Men with Breast Cancer*

What do men think about seeing a doctor? A total of nine autobiographical narrative interviews were conducted with men who were diagnosed with breast cancer.

*Seeing a doctor out of bodily concern – explicit suspicion of cancer.* Some men who perceived something unusual happening in their bodies were or had been sensitised toward a possible cancer disease, either by own previous diseases or by other individuals. They immediately went to see a doctor.

*Sensitisation by own previous cancer experience.* A few years before he had observed an unusual change of his breast, Karl Kuhn, for instance, had lymph node cancer that had begun beneath his armpits. When he observed a change of his breast, he immediately went to see a doctor and underwent the procedure of medical diagnosis and treatment.

*Sensitised by sensitised wife.* Other men were influenced in their behaviour by the assessment of their wives. Two men in this research were made aware of the change (and probably also of the potential cancer risk) by their wives. Franz Fielmann reports:

F.F.: My wife has noticed, has noticed, that I have something eh at the breast eh something eh there is a lump or so. (Franz Fielmann)

And Curt Carstensen tells:

C.C.: And then in November 99 my wife found this tumour in bed and said: “You have breast cancer.” (Curt Carstensen)

*Sensitisation by friends who have or have had cancer diseases:* Curt Carstensen experienced two sensitising incidents that supported him in seeing a doctor immediately: prior to diagnosis, unlike many men with breast cancer, he was aware that breast cancer can also occur in men.

C.C.: We were lucky twice, first, we knew a man with breast cancer.

I.: Mhm.

C.C. We knew, we knew, that breast cancer is possible in men, that was luck. (Curt Carstensen)

The second reason (“We were lucky twice”) for a quick diagnosis and start of medical treatment was that his family doctor already had experience in treating male breast cancer. Curt Carstensen continues:

C.C. That was my luck!. We found it in bed in the morning, went to the bathroom and in front of the mirror we have to, to. have called our family doctor and said: “I have cancer.” “I’ll come immediately.” And he did,. ehm then we were lucky the second time because I was his second male breast cancer patient. (Curt Carstensen)

Olaf Öttinger was also confronted with breast cancer as a disease among his friends. Finally, it was this experience that led him to discuss a change he had noticed in his body with his wife, and then to see a doctor for medical examination.

O.O.: and eh, briefly before Christmas eh a good friend came, we had known her well already since we started living here in D-town, and she came two weeks before Christmas and said she had been diagnosed with breast cancer.

I.: Mhm. (4 secs)

O.O.: She was sitting here and was very depressed and we tried to give her some support and well, yes. And when she was gone, I said to my wife I have something here as well but it has developed over some time already. (Olaf Öttinger)

### *Seeing a Doctor out of Bodily Concern – No Explicit Suspicion of Cancer*

*Direct visit to the doctor’s office:* Other men do not think of cancer right away: They initially want to have the bodily change they experienced examined thoroughly and to have the tumour removed if possible for aesthetic reasons. Bernd Biewer, for instance, reports:

B.B.: well,. I went to the family doctor. and in the breast I had felt such a, such a, such a lump, lump or whatever and he then eh, referred me to a day hospital, an out-patient surgery, there I went and there a doctor had a look at it and also made a diagnosis, it is a, a lipoma. May happen, can be quickly also, eh removed, no problem and eh, I was then given an appointment in the day hospital, in the morning, with an empty stomach. (Bernd Biewer)

Directly before surgery, another surgeon looked at the tissue that was to be removed and told Bernd Biewer that it is not a lipoma but a carcinoma.

*Delayed visit to the doctor’s office.* Some men do not relate the changes in their bodies to malignant tumours and, therefore, delay seeing a doctor. As Mark Müller reports:

A. SELTRECHT

M.M.: I don't know how, but I just touched myself there

I.: Mhm.

M.M.: and then at some point, I found that there is something that does not belong there and well. That was it.

[skipped]

M.M.: And then it went back and forth for a long time, and at some point I said, I can't help it, now I should go and see a doctor. But I can't tell when the point was, when it developed,

I.: Mhm.

M.M.: when I, when I really became aware of it, and when I actually did something against it. That I say: "Well, I go and see the doctor now and have him examine it." (Mark Müller)

Gustav Genz, on the other hand, delayed his visit to the doctor's office because of his family situation. He works in the medical field and anticipated that seeing a doctor would result in longer-lasting medical diagnosis and treatment procedures:

G.G. '99 was the big fateful year in the family. That was the year my mother died, and the year in which I had my first surgery. And, the surgery was long overdue. But, I didn't want to have it done earlier out of consideration toward my mother. And, also, I did not want anyone to know about it,

[skipped]

G.G. that was another reason,

I.: Mhm.

G.G.: why half a year and then three quarters of a year went by, before, before everything was done at a clinical level. (Gustav Genz)

Norbert Novak also delayed seeing his doctor. His tumour developed in such a way that he was already bleeding from his breast. Only an accident, in which he broke his leg, forced him to go to a hospital. There, the doctors discovered that a bone metastasis had caused the leg to break.

N.N.: and then. for six years, eh. when showering I have noticed in the left

I.: #Mhm.#

N.N.: #breast# is such a small, very small lump.

I.: Mhm.

N.N.: Well, I thought, that is nothing, that are the nerves probably, or whatever. Did not see a doctor, not at all. I went with these lumps for almost, let's say, three years.

[skipped]

N.N.: And one night, I bled heavily from one breast, something burst in here. (Norbert Novak)

*Interruption of diagnosis by the patient:* Ernst Eichler had already been to see a doctor, who recommended having the lump removed and examined. But, Ernst Eichler ignored the recommendation and delayed further treatment until, in the end, a 4.5 cm tumour was diagnosed.

Although these few cases do not allow for a distributional analysis of the results, a tendency can be derived that men take longer to have self-observed bodily changes examined by a doctor than women, which has a negative impact on their chances for a cure.

## DISCUSSION

### *“Men with Breast Cancer” – Focusing on Disease and Gender*

Looking back in history, medicine has been developed and practiced by men for men: From ancient oriental medicine and ancient medicine to the medicine practised at the beginning of the 20th century, doctors have consistently been men, apart from a few exceptions. It was not until the beginning of the 20th century that women were allowed to study medicine. And, written descriptions of disease-specific diagnoses and therapies also focused on men.

One exception was the subject of pregnancy. Here women were explicitly mentioned in medical diagnostic and therapeutic case descriptions (see Heeßel, 2006, p. 20). Other exceptions were the descriptions and illustrations of women with breast cancer. This was due to the phenomenology of the disease: From a historical point of view, breast cancer is one of the first types of cancer that aroused the specific interest of physicians. Other than tumours of the inner organs or the brain, breast cancer was palpable from the outside. And, at a later point in the course of the disease, sometimes, the tumour burst through the breast tissue, which hardly occurs anymore. Thereby, the tumour layed open and could be seen (cf. Norbert Novak: “And one night I bled heavily from one breast, something burst in here”).

At the same time, the symbolism of the female breast has changed over the centuries: During the first millennia of human history, the female breast was venerated: Only breast milk allowed newborns to survive (animal milk could only be preserved after Pasteur discovered the process of pasteurisation in the 19th century). From the 14th century on, painters used the naked breast and breast-feeding as a

motif. From the 16th century on, the breast was associated with erotic attributes. At the same time, wet nurses were used to feed newborns. Since the 18th century, the erotic attributes have also been used for political objectives. Psychoanalysis developed by Freud at the beginning of the 20th century led to giving the female breast psychological meaning.

At the end of the 20th century, apart from sexualisation, also commercialisation of the female breast can be observed in the media. The risk of getting breast cancer also began to raise public awareness at the end of the 20th century. However, it was always associated with the female breast. Even today, the public at large is not aware that breast cancer can also occur in men. Changes of the male breast are commonly associated – as suggested by empirical data – with aesthetically unattractive bodily changes, partly including gynecomastia (an enlarged male mammary gland). If there is no previous knowledge about the possibility of male breast cancer, men – unlike women – do not associate alarming signals with the risk of having cancer. If breast cancer is then diagnosed in men, the previously learned sex-gender-borders between women and men begin to blur (or weaken).

*“Men with Breast Cancer” – Focusing on Informal Learning*

In the course of their lives, women, having learned that breast cancer is a disease that has threatened women for centuries, have been confronted with the fact

- that this disease exists,
- that it is useful to palpate the breasts for changes every month,
- that it is recommended to see a doctor should changes be observed, and
- that it is possible to take part in regular screening programmes.

Therefore, learning processes in this context have taken place in passing or by personal experience with affected relatives or friends. When comparing the biographies of men with breast cancer to those of women, it becomes obvious that women are clearly more sensitised toward the topic of breast cancer. If they observe a change in their breasts, it often leads to the question: “Could it be breast cancer?” Due to not knowing that breast cancer can also occur in men, when observing such a change, this question is not considered by men. Men are more prone to consider aesthetic issues, which women are not, or rather are later during medical treatment (e.g. recommended amputation).

Newspaper, radio and TV reports contribute to the repeated confrontation with the topic of breast cancer. Here the disease is addressed and information is given about how to behave in the case of suspected cancer. In cinema movies, the disease is staged as the plot. And, in waiting rooms of gynaecologists, numerous sources of information on cancer screening programmes are usually provided.

While we can assume informal learning processes in women, there is no way of making informal learning processes a subject of didactic methods. Nevertheless, there are individuals who prepare certain information and make them available to the

public. Here we can examine (in the course of further studies) whether or not there is a pedagogical intent associated with the information and education campaigns. From the perspective of preventative health policies, the question arises who is responsible for such information and education.

It is exactly because breast cancer in men is blurring the sex-gender-borders that gender-specific handling of this disease is necessary. Unlike women, men are not serviced with public information, advice from physicians nor are they constantly confronted by the disease in a way that they might be affected themselves.

Ultimately, these differences also have an impact on the biography of the affected men. Focusing on whether and how far biographical changes occur in the course of the disease, the situation is different compared to that of the affected women (cf. Figure 3). Curt Carstensen, who was diagnosed with breast cancer at the age of 65, and was 75 years of age at the time of the interview, has turned the cancer disease to his purpose in life. He is actively involved in informing men about breast cancer.

The disease can have a long-term negative effect on men as well. For Bernd Biewer, who had started a business just before he was diagnosed, the cancer led to a considerable deterioration of his self-employment, due to his inability to work. As a result, at the time of the interview, his business was pro forma only, while his wife earned their living. Each of the other men (Ernst Eichler, Franz Fielmann, Gustav Genz, Norbert Novak) had developed metastases. Their everyday life is dominated by their illness trajectory. At the time of the interview, out of the total of nine men interviewed, three were still

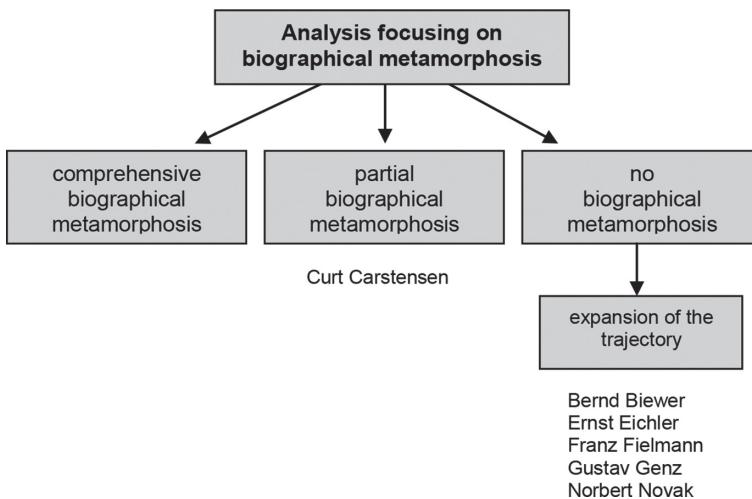


Figure 3. Allocation of five biographies to the categories “comprehensive biographical metamorphosis”, “partial biographical metamorphosis” and “no biographical metamorphosis”.



involved with the institutionalized flow and expectation pattern of tumour management or had just recently completed their therapy: Mark Müller had just received his second chemotherapy infusion, Olaf Öttinger was in his first week of radiotherapy, and Karl Kuhn had just received the last chemotherapy infusion six weeks before.

Due to the situation of tumour management, the institutionalized flow and expectation pattern of medical treatment is of major importance; given the time of the interview, it cannot yet be said what biographical relevance the breast cancer disease may have on the respondents' future, nor what its impact on their dominant process structures will be. In consequence, these three cases are not considered in the illustration.

Against the background of the clearly worse healing prognoses for men with breast cancer than women, urgent questions to address are: Is corresponding information necessary? If yes, in what institutional context should this take place? And, whose responsibility is it: that of the physician or that of a (health) pedagogue? Will, principally, more formal teaching and learning processes be required? There is an urgent need to start discussion of the tasks that can be derived from the presented analysis of the results in the context of adult education.

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*Astrid Seltrecht*  
*Department of Vocational Education and Training*  
*University of Magdeburg*  
*Germany*



## **5. THE VALUE OF INFORMAL LEARNING FOR ILLITERATE OLDER WOMEN ACROSS THE LIFESPAN**

*Perceptions of Elderly Women from a Rural Region of Portugal*

### INTRODUCTION

The role of informal learning in the construction of individual knowledge of both men and women throughout life is crucial to understand behaviors, attitudes, beliefs and self-images as members of society. This role is particularly compromised for illiterate people who did not have the opportunity to enjoy schooling during youth. Using the typology of informal learning proposed by Hrimech (2005), such persons may acquire knowledge either consciously or unintentionally by processes aggregated in tacit informal learning, explicit informal learning or self-directed learning. There are several central aspects to success in learning: intrinsic and extrinsic motivation to learn, observation of role models, the need to solve problems, reinforcement given by significant others, learning by trial and error, and the feelings of security and satisfaction with new knowledge. This list is not exhaustive but is useful to begin to understand how people can learn, even without participating in structured programmes or courses that confer a qualification.

Our focus on illiterate elderly women acknowledges that older persons may suffer several forms of prejudice resulting from the crossing over of sexism and ageism, among other ‘isms’ of social interaction. Their burden as victims of discrimination is probably even heavier because of their inability to read or to write.

For Portuguese women that are now more than 65 years old, education was almost always done inside the home focusing on the need for them to be good mothers and wives. They were typically considered to be the best teachers for their children before they went to school (Ferreira, 2007). Most of the possibilities for formal learning for the majority of these women were barred when they were young because of the traditional socialization values and because of the poverty then prevalent in the country. In the process of acquiring what they know about themselves and about the world, they did not go through “a linear sequential and hierarchical manner starting from basic skills and knowledge to more complex and sophisticated ones” (Hrimech, 2005, p. 310), to develop their functional competences as women, mothers and wives and as members of the community. Despite their lack of chances to go school and to

overcome the submissive condition imposed by illiteracy these, women recognize their lives as traces full of learning experiences, which were extremely rich and empowering for them in different spheres of action.

In this chapter we present the first phase of a PhD research project in the adult education field in the Faculty of Psychology and Sciences of Education of the University of Coimbra. The main goal of this research is to understand the learning strategies that illiterate women over 65 years of age, living in the municipality of Estremoz (Portugal's interior south), used across their lifespan to perform their several roles. Through a qualitative research methodology and listening to their voices, this investigation crosses gender issues with age and the contexts where these women grew up, stressing the constraints of the learning process in persons that used to suffer multiple discriminations, who did have a professional career and always lived with very low economic resources.

“GOD, HOMELAND AND FAMILY”: PORTUGUESE TRADITIONAL VALUES  
OF THE DICTATORIAL REGIME AND THE CONVENIENCE OF ILLITERACY  
CONDITION OF THE PEOPLE

In the end of first decade of 20th century (1911), when the Monarchy Regime falls in Portugal, 70 per cent of the population was illiterate. Since that time Republican governments tried to implement measures to improve Portuguese education, but there was no money to do that, because the State did not have financial conditions to pay to teachers and schools (Ferreira, 2007). An analysis of data from Population Census between 1890 to 1950 shows that the ages of schooling and literacy of substantial parts of the Portuguese population were delayed due to such circumstances, when compared to the norm which fixed mandatory schooling in certain ages (between 7 and 11 years-old or between 7 and 13 years-old) depending on the countries (Candeias & Simões, 1999).

Reading literacy indicators of population disaggregated by sex in historical archives suggests that at that time more than 90 per cent of Portuguese women were illiterate in most of the districts of the country (Ferreira, 2007). Compared to other countries of Europe, Portugal was among the least literate or educated countries in the Western world. It took more than a century to guarantee access to education for all school age children, until in mid-fifties (1955) of 20th century (Candeias & Simões, 1999).

With the implementation of Dictatorial Regime in 1939, there was a firm conviction that “Portuguese people did not feel the need to learn” (Mónica, 1977, p. 321). People with weak literacy skills were arguably easier to govern and to control. Nevertheless this indicator was not consensually considered a problem by different sectors of society. In her provocative but accurate publication about schooling during the decades of the politically dictatorial system that ruled the country for forty-one years, Mónica (idem) suggested that this situation was considered a shame by some Portuguese intellectuals and a virtue to those who defended the totalitarian political

ideas of Salazar's Regime. This influential sociologist transcribed an excerpt from Virginia de Castro e Almeida (1927), who wrote:

... knowing how to read and write, ambitions are born. (...) What advantages did they get going to school? None. Nothing was gained. They have lost everything. Blessed are those who forget the letters and return to the field. The stronger, healthier and more beautiful part of the Portuguese soul resides in these 75 percent illiterates. (cit in Mónica, 1977, p. 327)

Deprived to attend formal education due to economic, social, political and cultural reasons, people throughout their lives move through different situations and contexts in which they acquire skills, knowledge and expertise. In the interior regions of Portugal, tradition "... understood as a set of values, ways of thinking and ways of representation, (...) associated, for example, to songs, folk poetry, traditional embroidery, basketry, gastronomy, exhibitions was the 'cement'" (Costa, 1996, p. 29) of people's knowledge and also a way of transmitting it to younger generations.

The youngest generations of the Dictatorial Portuguese Regime that had as the core values 'God, homeland and family' are now old and constitute the main segment of the population that now suffer most in older age from a lack of literacy, in reading, writing and numeracy (Benavente et al., 1996). They are also at the highest risk of poverty, especially women (Vieira & Perista, 2012). Nevertheless they continue to learn informally throughout their lives and actively disseminate their knowledge by oral tradition to their descendants.

#### WHO IS AN ILLITERATE PERSON?

Portuguese National Statistical Institute (2003) defines an illiterate as an individual with 10 years or older who cannot read or write, that is, an individual that is unable to read and to comprehend a written sentence and to write a complete sentence.

Despite this lack of competences in dealing with basic codes of everyday life, social scientists have been suggesting that people "without formal education aren't culturally empty, and the schooled ones could be considered mere products of literacy" (Benavente et al., 1996, p. 115). According to Tfouni (2006), illiterate people "aren't 'less' or 'worse' [they] are rather different and alternative, because they, like the literate, are historical-cultural products" (p. 141). So, illiterate people may be unable in reading and writing competences, but not in thinking.

In fact, it is not necessary to go to school to learn. As Patrício (2004) said, "we learn in any circumstance: in the circumstance of family (...), in the circumstance of street (...), in the circumstance of school (...), in the circumstance of work, in the circumstance of leisure" (p. 13). This idea is also enhanced by Silva (1996), writing that "we are always involved, from birth to death, in the process of formal and non-formal social learning (...). We do not control all the variables and generally we do not control the most important variables of these learning processes. But we are not just objects in those processes, we are also subjects" (p.14).

Our learning depends on the contexts in which we move, the experiences that we go through, as well as the opportunities that we have access to. But it also depends on biological and cultural variables. In almost all societies, to be born one sex or another predestines the individual to play a set of activities in the different gender arenas and to perform distinct roles inside and outside the house (Alcoforado & Vieira, 2007). In addition, the family and the social environment tend to be structured differently for each sex (Beal, 1994), a fact that may have negative implications for both men and women across lifespan. These consequences may be even worse when crossed with illiteracy.

SOME CURRENT PORTUGUESE FIGURES ABOUT ILLITERACY IN  
GENERAL AND ELDERLY WOMEN IN PARTICULAR

In the Census of 2001, Portugal had an illiteracy rate around 9 per cent. The Alentejo's region in particular had 17 per cent of residents who were unable to write or to read. Ten years later, in the latest population Census from 2011 (INE, 2012)<sup>1</sup>, the national illiteracy rate was 5.2 per cent and 9.5 per cent for Alentejo (Table 1). The decrease can be explained, not by the acquisition of new knowledge, but by the progressive loss (death) of the older population. Whatever the reasons, the Alentejo region in comparison with the national rate has almost double the rate of illiteracy.

The study described in this chapter was undertaken in the mainly rural municipality of Estremoz (an interior region of Portugal). Table 2 lists the illiteracy rate (%) in each parish of the municipality of Estremoz, noting that the number of parishes and their names differ slightly from the current ones.

Table 2 confirms that the illiteracy rate of the municipality studied (Estremoz) is around 12 per cent, and that in three parishes only three years ago, over 19 per cent of the population resident was illiterate (Evoramonte, Santo Estevão and São Domingos de Ana Loura). Only one parish had an illiteracy rate under 10 per cent

*Table 1. Portugal's illiteracy rate in 2011 (%)*

<i>Region</i>	<i>Illiteracy rate (%)</i>
Norte	5.00
Centro	6.38
Lisboa	3.22
Alentejo	9.55
Algarve	5.34
Região Autónoma dos Açores	4.66
Região Autónoma da Madeira	6.97

*Source: INE, 2012*

*Table 2. Municipality of Estremoz illiteracy rate (%)*

<i>Parish</i>	<i>Illiteracy rate%</i>
Évora Monte	19.89
Santo Estêvão	19.44
São Domingos de Ana Loura	19.09
São Lourenço de Mamporcão	17.95
Santa Vitória do Ameixial	17.00
São Bento de Ana Loura	16.13
Glória	15.17
Arcos	14.52
Veiros	12.73
São Bento do Ameixial	12.09
São Bento do Cortiço	12.00
Estremoz (Santo André)	10.74
Estremoz (Santa Maria)	9.28
ESTREMOZ	11.91

*Source: INE, 2012*

(Santa Maria). This not only reflects the differences among parishes (even those belonging to the same municipality) but also their proximity to urban areas.

According to the 2011 Census, in Alentejo, men have an illiteracy rate of 7.1 per cent and women 11.8 per cent. When we focus on people over 75 years-old, the percentage for men was 33.2 per cent, and for elderly women 46.5 per cent. In the case of very old women, around one half of were unable to read or to write.

In the municipality of Estremoz, women have an average illiteracy rate of 14.32 per cent, and in all parishes women have a higher illiteracy rate than men (Table 3). Again, this condition gets worse with ageing. The lowest women's illiteracy rate (10.92 per cent) was identified in Estremoz (Santa Maria), and the highest women illiteracy rate of the municipality (23.40 per cent) was found in São Lourenço de Mamporcão (Table 3).

These older women face stronger discrimination compared with men of similar age, even today, because in the past they focused mainly on their domestic roles as wives and mothers, which were deemed suitable for their 'feminine nature'. Their potential roles in the public arena and possible civic roles outside the home were typically completely taken away from them. As Pereira (2007) showed in his analysis of the current situation of women, "the family and the concentration of women's roles in motherhood in many cases reflects a traditional view of gender performance that continues to attribute to women the duplicity of roles, a burden that pronounces



*Table 3. Estremoz women illiteracy rate (%)*

<i>Parish</i>	<i>Women illietracy rate (%)</i>
São Lourenço de Mamporcão	23.40
Santo Estêvão	22.50
São Domingos de Ana Loura	22.22
Santa Vitória do Ameixial	21.47
Glória	20.00
Évora Monte (Santa Maria)	19.18
Arcos	18.02
Veiros	15.11
São Bento do Cortiço	14.41
Estremoz (Santo André)	13.82
São Bento do Ameixial	13.55
São Bento de Ana Loura	13.33
Estremoz (Santa Maria)	10.92
ESTREMOZ	14.32

*Source: INE, 2012*

the maintenance of inequality, which follows, ultimately, social differentiation and reduced possibility of release” (p. 110).

In inner rural Alentejo (like the municipality of Estremoz), gender stereotypes are deeply entrenched in socialization practices due to the traditional values defended by past generations. This was (and still is today) supported by religious and cultural beliefs, conservative political discourses and societal institutions in general). This is why, boys and girls, the future men and women, have differential socialization. Research evidence has shown that from “the first day of life, fathers and mothers have interiorized for their sons and daughters cultural standards of masculinity and femininity, that they express directly through their attitudes and behaviors” (Vieira, 2006, p. 21), and that such messages are reinforced by other socialization agents.

Any effort to try to understand how the interviewees learned should include listening and asking older women to share with the researcher their deep views of what it means to learn and how they have been learning in spite of their condition of illiterate.

#### THE RESULTS OF A PILOT STUDY WITH PORTUGUESE ILLITERATE RURAL OLD WOMEN

Considering the conceptual framework of previous sections of this chapter and data on Portuguese illiteracy of very old women from inner rural areas, this section

presents the results of a qualitative pilot study conducted with four women, with ages between 72 and 92 years, from two different parishes (Glória and São Bento do Cortiço) mentioned in Table 3. These women are identified in the transcriptions presented here with the characters X, Y, Z, and W to protect their anonymity.

This research was based on a qualitative research methodology, and data were collected using a semi-structured interview guide. Answers obtained were analyzed by critical content analysis of elderly women's discourses, in an effort to capture, in their different life histories, "their memories of experiences, pathways and subjectivities, covering the period of her life from the earliest times until the moment of the meetings" (Araújo & Magalhães, 2000 p.13). This strategy of discourse analysis allows an identification of possible conceptual patterns that show how interviewees could effectively learn and overcome the obstacles imposed by an absence of formal literacy competencies.

Our interview guide was organized using three points: (1) Identification of learning contexts; (2) Comprehension of strategies and methods of learning; (3) Perceptions of differences/similarities between sexes and defense (or not) of differential socialization in the family. In terms of the learning context, we can identify informal situations of everyday life as providing the most important moments and significant opportunities in which elderly women developed their learning skills, including daily work inside and outside the house and life routines. For these women, informal learning was like a non-organized educational system, neither intentional or unintentional, and the education obtained was a result of its effects in changing their knowledge, attitudes and behaviors (Cavaco, 2002).

Daily work routines represent, for these women, the way that they earned a living in a very poor economic situation in which they lived. In the interior of the country, the agricultural sector was the main employer. Since a very young age these women started to work in very demanding physical jobs: weeding ("monda"), harvest ("ceifa"), and picking grapes ("vindima") (see Figure 1). We confirm this by listening to their own words about what they used to do outside the home:

When I was 12 years old, I already was catching olives "apanha da azeitona" and picking grapes "vindima" .... my father had a "ranch" (monte) and I started to go. my father did not want me to go... because we had to go by foot (almost 7 km)... it was very far and he was afraid I arrived already tired and had a full day's work ahead.... we began at sunrise [and worked until] sunset...." (X)

At 12 years I went weeding ("monda") and to harvest ("aceifa") (W)

At 13, I went harvesting ("ceifa") on only two paths ("margens"), in the next year, I took on three paths, I was earning the same as older women. (Z)

I was 10 when I did my first weeding ("monda"). Then I picked olives ("azeitonada") and afterwards I went to the harvest ("aceifa"). I only picked grapes (vindima) when I was older. (Y)



*Figure 1. Women picking grapes (“vindima”)<sup>2</sup>  
(Source: Foto Inácio, Évora, Portugal.)*

For the elderly women interviewed, daily life, like doing housework and performing domestic roles, was also a learning context very rich in experiences that allowed them to enrich their knowledge:

My mother left me a brother to take care of, when I was five, while she was at work. I had to do lunch, for me and my brother, and had to bring it to my father and to my mother at work. (Y)

If my mother arrived at our house and I hadn’t got things made, she beat me. I had to iron, I had to wash, I had to do the housework... (Y)

I had to do all the food, except for supper, because in the evening my mother was already home... she worked from sunrise to sunset... (Y)

My mother left me a pot on the stove, left me the potatoes and green beans beside it and I had to peel them. sometimes it went well; other times it was not so good... (Y)

If I saw that the street was dirty or things weren't done well at home... I ran away to an aunt who lived nearby. I only went home when my father arrived, because he wouldn't let my mother hit me... (Y)

In their discourses we can identify the effective acquisition of knowledge through daily routines, sometimes without the supervision of adults. Simple tasks for literate persons were not that simple for the illiterate. People who knew how to read and learn can use letters and words to undertake daily life routines and tasks. Illiterate people can't, so they develop different strategies that allows them to compensate and realize everyday demands. As Cavaco (2002) emphasizes, these strategies are related to 'adaptive solutions' that individuals apply in a very creative way, throughout their lives. For example, these women live (as they always did) in rural areas, so they have a need to travel to the municipality, to have access its services and products, but they can't read the transport information (like schedules and destinations):

To take the bus, I went to the station and watched where were the kids from my parish [were going], I knew which one was my bus .... Other times I asked someone. (X)

Because these women didn't attend school, they didn't learn by a formal and "propaedeutic" way (Schugurensky, 2000) typical of school. Instead they learned through different strategies and methods that can be identified in their talking:

- Learning with an older person – "who knows how to do it";
- Learning through observation and imitation of others;
- Learning by repetition and error.

These different adaptive strategies to acquire useful knowledge were used by women interviewees when they were young, are very explicit in the following transcriptions:

I learned with the other women. And my father had a bit of land and sowed it to give to the animals, so I soon learned alone how to reap. (W)

We were called "the ants". Nobody wanted to stand side by side with the other women. always forward. (X)

We were more curious than now. (Y)

I saw my brothers ... that day at school they learned until 10 ... tomorrow learned until 20 .... I did what they did. If I had attended school, I think I would not have been too bad for it.(Y)

We learned when we were tiny. Our parents taught it all. money. things. Only those who were very dumb didn't learn. (X)

The first pants I did, I unstitched another one, sewed the tissue on top, put the ticking in the background. it was the way I saw my Mother do it. (Y)

It was our mother who taught us. She put the tissue on the table, made a mould first and then we used it to do new pants. (W)

To make lace, sometimes we learned with each other ...sometimes we counted the stitches with our fingers. (Z)

Our skirt had to be measured by our mother. Sometimes we wanted it shorter. but it couldn't be; it had to be where she said.(Z)

I couldn't know how to see the hours, so my mother made me a risk on the street, so I could see when it was time to go get them dinner: when the shadow of the street (because of the sun) came to that place, it was time to bring them dinner. (Y)

We knew it was time to go to work by the stars. My mother went to the window and looked, if certain stars were already high, it should be so many hours. Other times we listened to the rooster singing. (Z)

The recognition of differences between men and women by these old ladies was other issue that we tried to explore in the interviews. We wanted to know if these elderly women could acknowledge differences in how boys and girls were raised in terms of their education.

These women, when asked generally if their lives had been different because of the fact of being women instead of being men, they did not realize that. But if we spoke about specific situations, they said that it would have been very different, in particular, by virtue of the freedom they would have been given by their parents. Age and gender were very important factors in the choice of who was going to stay at home or attending school. If a child is a girl, the task of educating was based on the perceived 'natural competencies' of women to stay at home and perform domestic roles:

I wasn't the oldest, the oldest was a boy, but he stayed in school... I was the girl. I was seven years. (X)

My mother pulled me out of school, but I liked going there ...To stay with my brothers. We were three. There were two boys and I. (Z)

Then came another boy, I had seven. I had to raise him as well. They both went to school. (Y)

I cannot say that my father did this, but there were many who did not go to school because their parents only sent the boys... there was always a house full of people (X)

Only the eldest didn't go to school. My other sister, that was younger, and I went to school. But the eldest stayed at home to help my mother. (W)

Some said: go to school? For what? To write letters to their boyfriends? Wasn't more beautiful if you could write it yourself, than to be asking someone else to write it? Because in the old times our dating was like this ... the boys sent us a letter and we answered it... If I wanted to send a letter to my boyfriend, without being full of mistakes and crap, I had to ask to my sister to do it. It was then that I cried. Because my brothers and my other sisters went to school and I didn't. (X)

Other gender related aspects focused on by the women interviewed included clothing: there were clothes they could and couldn't dress in according to his/her biological sex:

My father didn't say anything, but the way girls dressed was also different ... girls couldn't have a sleeveless blouse or with larger neckline, had to wear socks... Couldn't cut their hair short .... my father was not of these things. (X)

What was different was that my brothers could go everywhere, we could not. Because girls could not go there.... And when we were going, we had to take "the patrol." (X)

We only could go to dances, if we asked our father... The dances were in a large barn near my parents' business, so before we went there, he was going to see who was the singer, if it was good or not.... (Z)

Today women and men dress in pants, it wasn't that way then. (Y)

#### FINAL THOUGHTS

Very old women that are still alive nowadays in Portugal were restricted from attending formal education in childhood, mainly because they were born female. But such dramatic barriers to formal education did not prevent them from acquiring knowledge, skills and competencies that enabled them to overcome the obstacles created by their situation of illiteracy, and often became competent, at a personal, familiar and/or social level.

Using their resources, sometimes in circumstances of extreme poverty, these women learnt through informal learning practices and contexts, right through their lives, adopting strategies and methodologies suited to the uniqueness of their experiences. At the same time they learnt gender roles, they learnt to be women, mothers, citizens and members of a broader community, where they became important elements and even agents of social change.

Even without educational programmes or structured curricula that could grant them certifications or diplomas, these women were able to develop critical thinking

which allowed them to question their lifestyle, somehow accepting it and trying to justify them as cultural heritage.

#### NOTES

- <sup>1</sup> Data available at (download at 20th, november, 2014): file:///C:/Users/Cristina/Downloads/Censos2011\_ResultadosDefinitivos\_Portugal\_1.pdf
- <sup>2</sup> This picture was already published in a book of the Project of Rural Schools from the municipality of Estremoz (2000), with the title “Things of Women”, which was coordinated by Adosinda Pisco, with the support of Educative Communities Institute (ICE). Reprinted here with permission.

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*Joana Pisco Véstia da Silva*  
*Faculty of Psychology and Sciences of Education*  
*University of Coimbra*  
*Portugal*

*Cristina C. Vieira*  
*Faculty of Psychology and Sciences of Education,*  
*University of Coimbra*  
*Portugal*





**PART II**  
**MINORITIES AND ACTIVISM**



## 6. BEARDED WOMEN

### *Feminist Activism in “La Barbe” as a Form of Informal Adult Learning*

#### INTRODUCTION

Based on our experiences as vocational training lecturers and trainers in local and international development, our students/participants are mainly either politically aware people or committed activists. As for us, we are involved to varying degrees in different organisations which have in common a collective dimension: feminist movements and networks, cultural associations, local development boards, NGOs. Our strong interest in learning, adult education and transmission processes, led us to examine how the involvement in such organisations influences individual paths, and if this commitment turns out to be a source of learning, whether it is capable of affecting individual transformations, especially in terms of “power”. In the sense of Haraway (1988) and Harding (1987), our “standpoint” is not neutral, but clearly situated regarding our own activist experiences.

Our research focuses on the informal learning processes that take place for the members of one of the recent feminist organisations: La Barbe<sup>1</sup>. This French movement<sup>2</sup> differs from other relatively recent feminist movements by its mode of action.<sup>3</sup> Founded by feminist activists in the wake of the 2007 French presidential campaign, which had spurred sexism against Ségolène Royal, the first and only female candidate bearing serious election chances, La Barbe started as an activist movement in 2008.

Through targeted action, activists interfere in places of power during particular events, wearing a false beard in order to pinpoint – in an ironic manner – the persistence of male power and hegemony, and to make visible the numeric and symbolic domination of men in these places. La Barbe thus refers to a symbol of virility – the beard – and draws on an expression used in vernacular language in which a verbal form of the word ‘beard’ is used to express a feeling of exasperation<sup>4</sup>. La Barbe turns this expression into a pun, conspicuously staged<sup>5</sup>. The activists – women only – ironically “congratulate” the assembly for participating in the perpetuation of male domination in society and for resisting the feminisation of public life. These public appearances of La Barbe are covered and communicated by the media, press, television and social networks but also by videos made by the Barbues<sup>6</sup> and posted on their national website<sup>7</sup>.

The choice of this research topic is partly explained through the personal experience of the authors. One of them has been a member of La Barbe since 2010. The other author knows some of the founding and active members personally, and has closely followed the evolution of the organisation since its creation. Furthermore, the interesting mode of action – work in local groups involving ironic and provocative public appearances around a key symbol of masculinity, that is the beard, and a strong use of media and social networks - justifies the choice of this particular example of a feminist movement. Throughout this research, we seek to analyse the informal learning effects resulting from a militant engagement in this particular organisation, without resorting to comparisons with other forms of feminist engagement.

### CONCEPTUAL FRAMEWORK

In order to study the effect of formative involvement in La Barbe, we refer to the definition of informal learning proposed by Schugurensky (2000):

Informal learning takes place outside the curricula provided by formal and non-formal educational institutions and programs. In the concept of ‘informal learning’, it is important to note that we are deliberately using the word ‘learning’ and not ‘education’, because in the processes of informal learning there are no educational institutions, institutionally authorized instructors or prescribed curricula. It is also pertinent to note that we are saying ‘outside the curricula of educational institutions’ and not ‘outside educational institutions’, because informal learning can also take place inside formal and non-formal educational institutions. In that case, however, the learnings occur independently (and sometimes against) the intended goals of the explicit curriculum. (p. 2)

The assumption that activist engagement is a source of informal learning is a component of a larger action-research project on how to teach participatory methods to professionals of sustainable development.<sup>8</sup>

We know that adult learners (for example in literacy programs in the US) consider that one of their educational objectives is to give voice to their ideas, trusting they will be heard (Stein, cited in: Mezirow, 1997). Our research question aims to address the reversal of this evidence: is the action of giving voice to one’s ideas in public space an experience of informal learning?

The type of learning that can occur in this kind of context is best described by transformative learning, as developed by Mezirow (1997) since the 80s:

Transformative learning is the process of effecting change in a frame of reference. Adults have acquired a coherent body of experience—associations, concepts, values, feelings, conditioned responses—frames of reference that define their life world. Frames of reference are the structures of assumptions through which we understand our experiences. They selectively shape and delimit expectations, perceptions, cognition, and feelings. They set our “line

of action.” Once set, we automatically move from one specific activity (mental or behavioural) to another. We have a strong tendency to reject ideas that fail to fit our preconceptions, labelling those ideas as unworthy of consideration—aberrations, nonsense, irrelevant, weird, or mistaken. When circumstances permit, transformative learners move toward a frame of reference that is more inclusive, discriminating, self-reflective, and integrative of experience. (p. 5)

In order to explore the question of the informal learning effect of feminist activism, we have chosen to refer to the theory of transformative learning. This theory is centred on the meaning of experience. Instead of non-critically assimilating explanations given by an authority figure, transformative learning develops the adult learner’s capacity to understand the meaning of his/her experience. Transformative learning develops autonomous thinking, which is crucial for women in the almost universal context of patriarchy (at different degrees). When reorganising the meaning of an event, the “lived situation” will be transformed into “experience”. This process is possible through personal development, socialisation and the reinforcement of the conscience of being a unique human being in a dynamic, pluralistic world (Mezirow, 2001).

A limit of using the theory of transformative education is that this concept applies above all to formal adult education. Taylor and Jarecke (2009) insist on the place and the role of the educator as a model for alternative beliefs and behaviours (Taylor & Jarecke, cited in: English & Peters, 2012). In the case of this research, the setting is a feminist movement, which is very different from an institution of formal education. We therefore transpose Mezirow’s transformative education theory, looking for effects of transformative informal learning. Taking account of the importance of the educator in Mezirow’s approach, we assume that longer term members in a feminist organisation play a kind of educator role, and that the strongly co-constructive and reflexive nature of the operation mode of La Barbe (see below) makes the co-members into peer-educators of informal learning.

While Mezirow has not theorised from a gender perspective<sup>9</sup>, socially constructed gendered identities clearly qualify as “habits of mind”,<sup>10</sup> one of the components within Mezirow’s reference framework (the other dimension being a point of view). These elements are central to the social construction of gendered identities as well as shaping the self-image, the perceptions, the roles and ambitions of individuals in relation to the biological category they have been put into since their childhood. In order for women to become conscious of their habits of mind and the way these ways of thinking, feeling and acting have been structured on gendered lines, they have to put their frames of reference into question. Becoming aware of the way one has integrated and assimilated one’s gendered self-image, analysing how this self-image has influenced one’s choices – training, career, role in public and private life and exploring alternative ways of living one’s feminine identity are all key stages towards developing a feminist conscience and a motivation for feminist activism. In general, the gender approach invites self-reflection and retrospection on individual life stories and the way they have been modelled by social structures on

gendered lines, which arguably overlaps with the psycho-developmental focus of the concept of transformative learning. There is also a social emancipatory element in transformative education, in the same way that feminism holds an empowering agenda (English & Peters, 2012).

Another interesting link in the light of the operational mode of La Barbe (see below) is the great transformative learning potential of experiences that move the learners outside their comfort zones. Taylor and Jarecke (cited in: English & Peters, 2012) argue that it is unlikely for learners to seek discomfort. However, in the context of an activist engagement, this discomfort can be considered by the activist as a necessary challenge to face. The activist is therefore putting herself unintentionally in the posture of an informal learner.

Mezirow (Mezirow & Associates, cited in: Merizow, 1997) himself has mentioned participation in social action as one of the methods of transformative learning. Taylor and Foley (cited in: English & Peters, 2012) drew attention to the kind of transformation that can occur through informal learning in community-based social movements.

Considering that the feminist activists are women that feel that they are not usually heard enough in public space, the fact that they are publically giving voice to this idea is potentially an experience of informal learning.

English and Peters (2012) made a similar assumption in their interpretative research with 8 women from feminist non-profit organisations in Canada about their experience of transformative learning in these organisations. In the case of La Barbe, apart from the product of the activist work (e.g. the public intervention that are characteristic of this organisation), it is the process of activist work and the internal working and decision-making procedures that are potentially a learning experience.

Mezirow listed the following conditions for transformative learning: those participating have full information; are free from coercion; have equal opportunity to assume the various roles of discourse (to advance beliefs, challenge, defend, explain, assess evidence, and judge arguments); become critically reflective of assumptions; are empathic and open to other perspectives; are willing to listen and to search for common ground or a synthesis of different points of view, and can make a tentative best judgment to guide action (Mezirow, 1997). Indeed, many non-profit organisation, and especially the feminist ones, are claiming to function according to such principles.

The analysis of the informal learning effect of feminist activism in La Barbe has been undertaken solely from the perspective of concerned activists. Theoretically, the learning effect of such advocacy could also be questioned as far as the targets of La Barbes' interventions are concerned. Transformation theory states that moral values – such as gender equality – are legitimised by agreement through discourse. The claim is that if everyone could participate in a discourse, under the ideal conditions of discourse, there would be a universal, rational consensus concerning these values (Mezirow, 1997). Advocacy can be considered as a form of engaging in such discourse, and research about its informal learning effect on the organisations

targeted by the advocacy could give some insight into this kind of involuntary form of informal learning. But this perspective has not been taken into account in the present research.

Another element we have chosen not to specifically consider is the question of a potential specificity of women's ways of learning. The emphasis of supportive relationships in women-only settings (as it is the case in La Barbe) is an important theme in research about women's learning styles (cited in: English & Peters, 2012). However we do not compare the informal learning of women in La Barbe to forms of informal learning in mixed groups or in male activists' movements. Since we seek to avoid a constructivist framework looking at women as a unique group, we do not focus on the idea of a female specificity in ways of learning, but rather on informal learning about gender.

#### RESEARCH QUESTIONS, METHODOLOGY, DATA COLLECTION AND ANALYSIS

Focusing on this notion of "meaning" in a reflective analysis of so-called informal learning situations, gives us a framework of analysis relevant to our quest to understand the "learning" dimensions of the experiences within a feminist activist group. By deconstructing societal norms through the public denunciation of male domination, La Barbe offers a new framework. Since learning leads to a change of reference frames and of patterns of meaning, it allows us to assume that activism within La Barbe has an added value in form of transformative learning through changes of patterns and perspectives.

Our central hypothesis is that through active engagement in and sense of belonging to La Barbe, women attain higher levels of consciousness and acquire new skills that implicitly or explicitly allow them to move the lines of their lives in individual and collective dimensions. La Barbe is at the same time a source, a receiver and a reflector of transformative learning. It is the "engine" of the learning dimension, because the public denunciation of male domination represents a shift of the frame of reference built for years on conventional assumptions. The 'receiver' dimension comes from the transformative potential that was there among the Barbues in a more or less obvious manner, depending on their life course (and on aspects like being heterosexual, lesbian, divorced, with a feminist partner, etc.). They joined La Barbe because they looked for such a receiver, effectively allowing them to question their frame of reference in a collective setting. La Barbe also has a potential 'reflector' dimension in the sense that the acquired consciousness and competence will not just improve their activism. The learning "gained" in La Barbe potentially reflects on the Barbues' individual, professional and even private lives (e.g. the experience of speaking up in public or not lowering ones eyes in a verbal confrontation can be transferred to the professional or private lives of the Barbues, which proves that there has been individual change). These are the transformative learning dimensions of this form of activism that we wanted to identify.



Joining La Barbe is an activist commitment that has no learning objective in itself. Therefore, the research should allow us to validate or invalidate the following hypotheses about the transformative effect of this militant practice:

- The mode of action of La Barbe is a form of determined conquest of public space – a form of “takeover” – which is very instructive as an experience, especially in relation to obstacles that women usually face concerning their place in the public space (professionally or otherwise).
- Through the denunciation of widespread and/or institutionalised discriminatory practices, the Barbues learn – on a collective and individual scale – to transgress the established codes.
- The democratic and collaborative nature of the operational mode of La Barbe (before, after and during the public appearances) greatly increases this effect and turns the collaboration with La Barbe into a learning experience.
- The “learning gained” from the activism with La Barbe is reinvested by the concerned women in their own lives (private, professional, emotional) for developing their skills and understanding of the context in which they operate, by refining their critical thinking.

In order to verify these hypotheses, we launched a questionnaire through La Barbe’s mailing list (see below).

For the purpose of analysis of the answers, we used the concept of different types of “power” as they are developed in the literature on empowerment. The empowerment approach is not a specifically feminist notion, but it has been widely adapted by gender activists, as it highlights the power dimension of inequalities faced by women on individual and collective levels.

In some of the scientific and methodological literature on empowerment (Williams et al., cited in: Oxaal & Baden, 1997) the notion is deconstructed into 4 types of powers:

*Power over:* This power involves an either/or relationship of domination/subordination. Ultimately, it is based on socially sanctioned threats of violence and intimidation. It requires constant vigilance to maintain, and invites active and passive *résistance*. The implications in practise are conflict and direct confrontation between powerful and powerless interest groups.

*Power to:* This power relates to having decision-making authority, or power to solve problems, and can be creative and enabling. Strengthening this type of power implies capacity building, supporting individual decision-making and leadership.

*Power within (interior power):* This power refers to self confidence, self awareness and assertiveness. It relates to how individuals can recognise, through analysing their experiences, how power operates in their lives, and gain the confidence to act to influence and change it. It involves increasing self-esteem, self-awareness, consciousness and confidence.

*Power with:* This power involves people organising with a common purpose or common understanding to achieve collective goals. Social mobilisation, building alliances and coalitions strengthen this kind of power. (Oxaal & Baden, 1997, Williams et al., cited in: Oxaal & Baden, 1997)

The notion of empowerment as it is used by the feminist movements<sup>11</sup> fits perfectly into the theory of transformative education. Since we are looking at the process of “gaining power” with different dimensions, the shift of frames of reference is central to the perception of empowerment by the concerned individuals. Furthermore, the empowerment approach includes an individual and a collective dimension, which is particularly relevant to research in the context of a feminist movement in which individual and collective transformations are strongly linked.

Mezirow’s “habits of mind” shape – among other things – our psychological self-image, which is central to our interior power. As a result of transformative learning, these habits of mind shift and we become more aware about why we do (or do not) act in certain ways and consciously choose whether (or not) to revise our ideological frameworks (Cranton cited in: English & Peters, 2012).

The process of acquiring powers reinforces the learning process by promoting the passage from incidental learning to intentional learning. The conscious analysis of the activism with its different phases (see below for La Barbe) and a growing awareness of the learning processes strengthen the individuals’ “interior power”. This dimension represents a Gordian knot in a transformative learning process. The reinforcement and stabilisation of this type of power is an essential ingredient in the process of the individuals’ personal transformation.

The different types of power – namely the power to, within and with – are obviously related to each other and are mutually reinforcing. Nevertheless, such a typology brings out different types of learning and allows for a classification of the answers to the questionnaires.

Our study seeks to understand how the learning process of the Barbues evolves, from the moment they chose to join La Barbe, until the inner transformation and the awareness of this transformation, in the sense of mindfulness (Langer, 1989), defined as a mindset of openness to novelty in which the individual actively constructs novel categories and distinctions.

During this first phase of this research, a questionnaire was given to the active members of La Barbe to encourage them to share their perceptions and to self-analyse the learning effect of their militant commitment. The choice of an online questionnaire, with a combination of multiple choice questions as well as open questions, with the possibility of freely choosing which and how much information the participant wants to share about her personal profile allowed for anonymous participation and addition of varying degrees of personal detail. In a future phase, this research could be carried further through semi-structured individual interviews.

By choosing a questionnaire, the choice was implicitly made to focus on “conscious” learning, in the sense that learners are aware of the learning aspect of

their activist commitment (despite the fact that *a priori* it was not their original intention when joining La Barbe). The comments of some respondents during the survey phase indicated that this awareness may (at least partially) be triggered off through the questionnaire itself.<sup>12</sup> Therefore, it is possible that the act of submitting the questionnaire contributed to the informal learning effect, because it stimulated a perception amongst the respondents that was not necessarily explicit before. The perception of the concerned individuals potentially acts like a filter. Subjective by nature, the personal perception can reduce the spectrum of learning effects that are identified. For example, one of the founding members emphasised other members' change in body postures during La Barbues' public appearances. Very visible to her, the concerned individuals might not have been conscious of this evolution.

#### THE CONTEXT OF THE INFORMAL LEARNING: LA BARBE

La Barbe is a national, informal movement composed of non-mixed regional groups: the movement decided not to comply to any formal organisational status, which also allowed it to avoid legal measures aimed at La Barbe from organisations, structures and institutions targeted by their public interventions. However a formal association – “the Friends of La Barbe” – has been created that allows fundraising and is an open space for reflections and debates.

Information is shared through mailing lists for each of the 4 groups (West, Paris, Bordeaux, Toulouse). There is also a national mailing list (managed by the Paris group) that each Barbue can access by becoming a member of the Association of the Friends of La Barbe.

Each local group can explore its own way of functioning and develop a type of internal governance that suits the local members. The process of establishing the rules and procedures of each local group has been a learning experience in itself, because it has stimulated discussion and exchange between different viewpoints.

One of the points of converging interest of all the Barbues is choosing the targets for their interventions. They seek to identify places of power where male domination is exercised. Another key element all members agree on is the use of irony as a specific signature of the Barbues' interventions. The irony is twofold: on one hand, the out of date style (19th century) beards symbolise patriarchy and paternalism. On the other hand, the participants distribute ironic leaflets to the public, in which La Barbe congratulates the men for their “achievements”. The criticism of male domination takes an ironic form by highlighting that these men remain largely amongst themselves in these spaces of power. The La Barbe members with their beards pretend to congratulate the male (or mainly male) assemblies that are targeted for “resisting against the advancement of women in society”. By preaching the opposite (e.g. the virtue of excluding women from powerful positions in the public sphere), les Barbues use humour to raise awareness about the facts that they denounce (e.g. the recognition that women are still effectively excluded from powerful positions in the public sphere).

### *The Mode of Action of La Barbe*

In order to understand the learning effects of the investment in La Barbe, it is necessary to understand their mode of action.

The first phase is the preparation and the public intervention itself: The choice of targets for La Barbe's public appearances is based on a continuous monitoring of public events (through the internet) or via less public, important events (e.g. the annual meeting of shareholders of a company<sup>13</sup>). Sympathetic non-members who share La Barbe's values might provide information on potential targets.

The concerned regional group of La Barbe validates this choice. The interventions agreed on are programmed and planned through discussions by email, phone and/or during monthly meetings. In general, once the target is identified and the decision to intervene is taken, the internal operating mode includes the following phases<sup>14</sup>:

- Elaboration of the press release and the leaflet (photocopy),
- Contacting the media at different levels (local, national,...),
- Identification of the interventions location (accessibility, how the group will be deployed, etc.), either through virtual means or by visiting the venue before the intervention,
- Anticipation of the precise operating mode, such as when and how to access the venue to be seen and heard, and how to leave the place "easily" after the appearance,
- Choice of the reader of the leaflet, who reads it aloud in front of the whole venue,
- Preparation of the necessary material: banner, beards, leaflets.

The casting is decided in a consensual manner, respecting the way the women in the group want to allocate the roles according to their skills and desire.

The second phase is the public intervention and the debriefing that follows. During these appearances, the challenge is for the group to impose itself and for the reader to speak up without being invited nor expected, to read the ironic statement explaining the appearance of the group, while the other Barbues extend the banner of La Barbe (see Figure 1). When leaving the venue, the activists distribute the paper copies of their statement.

After the event, an important debriefing phase takes place through a discussion between the participants, who are invited to express themselves individually about what has been experienced, how they felt, what was pleasant or difficult, and what lessons could be learned for future interventions.

The third phase, communication and dissemination, takes place after the public appearances. The dissemination of the press release, photos and videos on social networks (once they have been edited) and on the website of La Barbe enhances the visibility and public recognition. The interventions and the follow-up communication around the events represent a form of advocacy through "naming and shaming". They seek to inform the general public about these facts of gender-inequality, in order to summon or encourage the denounced actor to change. Finally



*Figure 1. La Barbe of Bordeaux during the international Comic festival in Angoulême, 2013*

archiving these products in the La Barbe website<sup>15</sup> allows an active capitalisation of the mobilisation.

#### DATA COLLECTION

A questionnaire was developed in order to survey members of La Barbe. It was tested and put online. This survey was announced on the website of La Barbe, Paris. It contained the following questions:

- Since when have you been a member of La Barbe?
- How many meetings of La Barbe have you participated in?
- How many public interventions of La Barbe have you attended?
- Does the involvement within La Barbe have any learning effects on you? (broadly defined in terms of self-image, concerning your activism or professional life, your posture in a public space, etc.)

If yes, which one:

In your opinion, what elements of La Barbe's mode of action (preparation, public intervention, debriefing...) are most instructive for the aspects that you mentioned?

If not, please elaborate on your answer:

- Thank you for sharing information about who you are (socio-professional category, age, activist career, other elements etc.):
- Would you be willing to make yourself available for an interview by skype, phone or in person to elaborate on your answers with one of the interviewers?

## ANALYSIS OF THE ANSWERS

After two reminders, we received 14 responses. Considering that the mailing list of Paris includes about a hundred women, half of whom are active (at least one comment during discussions on the list), the response rate is of almost 30 (thirty) per cent (14 out of 50).

The respondents were between 23 and 61 years of age, with the majority (6) being between 30 and 40 years.

The date of entry in La Barbe varied between 2008 (a founding member) and a person who had come to La Barbe only this year, with a balanced distribution (3 or 4) for the years 2010 to 2012 as years of entry.

Corresponding roughly to the time of membership, there was a relatively balanced distribution of participation in meetings.

The number of public interventions in which they had participated varied from 1 (1 answer) to 20 (3 responses), with 5 who had participated in 10 to 20 appearances.

Concerning their socio-professional profile, the members of La Barbe were more from middle class to upper middle class backgrounds and worked in education, health and culture fields. The majority of respondents had former activist experiences, in feminist organisations or involving other social and/or political or union commitments. There were also:

- 2 who had no prior activist experience
- 4 who were long-time activists
- 1 respondent did not answer this question,

As far as learning from the experience with La Barbe is concerned, there was only one person out of 14 who stated that she felt that she had learned nothing from her activism with La Barbe. She explained this by her extensive prior experience in community activism using the same types of modes of action as La Barbe.

The remaining 13 respondents were clear that engagement with La Barbe had produced a learning effect. The answers mentioned the acquisition or the consolidation of different types learning that can be assimilated to different types of power in a large sense, linked to the notion of empowerment.

The answers to the question about the learning effect have been analysed through the prism of the different powers constituent of empowerment as cited above.

According to this typology, 11 of the 13 respondents mentioned the “power within”:

- “Self-confidence”
- Assurance
- Self-affirmation, assertion,
- Triggering awareness (in the sense of eye-openers)

The same number of answers accounted for different forms of “power to” strongly linked to the “power within” dimension. They related primarily to the interventions in the public space:

- Speaking in public
- “Taking up space” in the public sphere, positioning oneself
- Knowing how to defend ones’ ideas and rights, knowing how to motivate others
- A sense of repartee
- Stress management

Some respondents mentioned that such learning had impacted on their professional lives.

Some items in the “power to” category identified learning technical skills:

- Communication, relations with media, use of social networks
- Logistics

Various other elements might also be classified as “power to”:

- Awareness about gender equality through enhanced knowledge
- Capacity for analysis and structuring of thought and reflection
- Information monitoring
- Vigilance
- Sense of realism

The contributions in terms of “power with” are also very important:

- Experience of collective modes of action
- Co-construction,
- Solidarity, sorority
- Information flow

In connection with the “power over”, there were references to learning in terms of contestation of dominating power (quotations):

- Interrupting elder men
- Resisting law enforcement officers
- Exercising the right to speak despite the fact that it was not authorised,
- Continuing to read a leaflet despite hostile reactions.

The term ‘empowerment’ was also once mentioned explicitly.

#### CONCLUSION, LIMITS AND PERSPECTIVES

To conclude the presentation of our preliminary results, we confirm that activism in La Barbe can be considered as a form of informal learning, as the vast majority of respondents clearly perceived a significant effect in terms of learning from their participation. This learning is informal, in the sense that it is not the objective of La Barbe and there is no specific or explicit educative action. As noted by the respondent who was among the founders, the impact in terms of learning depends largely on the “starting point” of the person who joins La Barbe.<sup>16</sup>



It is by virtue of the individual's commitment, through and in support of the collective capacity of La Barbe as an organisation, that learning occurs. Besides the public intervention itself, informal learning is taking place in the group, through the expression of opinions and preferences, through participation in collective decision-making and through the collective execution of organisational or communicational tasks. This leads to the development of critical thinking through action, a form of "reinterpretation through action". This kind of process can be classified as intelligent learning because the practical activist experience is accompanied by reflection (Merizow, 2001).

The limitations of this research are mainly linked to the time factor. Many responses arrived late and the individual interviews could not be carried out before completing the present chapter, which provides only a partial conclusion. Another weak point is the absence of a comparative perspective (comparison with activism in other feminist organisations – "classic" feminist associations, but also Femen, etc. – and other modes of actions – demonstrations, petitions, artistic performances, etc.).

Several points need to be looked at in depth during the next stage, such as continuing the analysis of the specific use of humour and irony, or addressing the importance of the non-mixed setting. These prolongations are necessary in order to investigate if these elements have a decisive effect on the learning process that accompanies activism in La Barbe. Further investigations will allow us to deepen our understanding of the nature of informal learning (e.g. the existence or not of a threshold effect in the learning process, etc.), to identify more precisely the sources of the identified learning effects and to understand the extent to which the women involved can "reinvest" their increased powers elsewhere in the public and private sphere.

## NOTES

- <sup>1</sup> La Barbe literally translates as 'The Beard', but has several different meanings in current language that are lost in a literal translation: 1) "(Oh) la barbe!" is very versatile and can mean: Shut up! That'll do!, and can be accompanied by a gesture of dismissal. 2) "Quelle barbe!" means: What a bore, What a nuisance! What a pain in the neck!, and can be accompanied by a chin-stroke as if one was caressing a beard.
- <sup>2</sup> We use the words 'organisation' and 'movement' as synonyms in this text, disregarding the possible conceptual distinctions.
- <sup>3</sup> Concerning other relatively recent feminist movements in France, we can mention "Osez le féminisme" and at an international level, but very mediatized in France, the "Femen", whose members also use physical attributes in their communication. Whereas the latter stage women's bodies, La Barbe uses masculine physical attributes.
- <sup>4</sup> "Ça me barbe": "I have had enough of it".
- <sup>5</sup> Playing with the different meanings of La Barbe, another expression has been expression forged in line with the feminist agenda: "La barbe de la barbe": "We have had enough of all these beards (=male domination)".
- <sup>6</sup> "Barbues" means "bearded women", the members of La Barbe use this term to refer to themselves.



- <sup>7</sup> [www.labarbelabarbe.org](http://www.labarbelabarbe.org)
- <sup>8</sup> <http://chaireunesco.u-bordeaux3.fr/?Approches-participatives-comment>
- <sup>9</sup> This is particularly astonishing as the original concept of transformation emerged from Mezirow's 1978 study on women (cited in: English & Peters, 2012, p. 105).
- <sup>10</sup> Habits of mind are broad, abstract, orienting, habitual ways of thinking, feeling, and acting influenced by assumptions that constitute a set of codes. These codes may be cultural, social, educational, economic, political, or psychological. Habits of mind become articulated in a specific point of view—the constellation of belief, value judgment, attitude, and feeling that shapes a particular interpretation (Mezirow, 1997, pp. 5–6).
- <sup>11</sup> International development agencies have used the empowerment approach since the Beijing conference in 1995 in a more depoliticised version, aiming only at individual empowerment and tending to reduce it to gains in economic power (which implicitly aims at integrating poor women into the market economy).
- <sup>12</sup> We received for example the following remarks: “I never asked myself this question before !”, “I will have to think about this a bit longer...”, etc.
- <sup>13</sup> This might imply that some members become shareholders themselves, in a minimalistic way.
- <sup>14</sup> This description refers to the operating mode of the Bordeaux group.
- <sup>15</sup> [http://www.labarbelabarbe.org/La\\_Barbe/Actions/Archive.html](http://www.labarbelabarbe.org/La_Barbe/Actions/Archive.html)
- <sup>16</sup> The answer of the one person who said they did not learn can be interpreted in the same way.

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*Catherine André*  
*UNESCO Chair “Training of Professionals in Sustainable Development”*  
*LAM and IATU/STC*  
*University of Bordeaux Montaigne*  
*France*

*Elisabeth Hofmann*  
*UNESCO Chair “Training of Professionals in Sustainable Development”*  
*LAM and IATU/STC*  
*University of Bordeaux Montaigne*  
*France*



LETITIA TRIFANESCU

## 7. AGAINST PATTERNS OF DOMINATION

### *Migration as an Act of Empowerment and Learning*

Research in education cannot be conceived independently of the socio-cultural, historical and political context of its development. Informal education of adults, learning and self-transformation must be analysed while considering life contexts, their evolution and their impact on individuals' lives. This chapter focuses on such a biographical perspective by studying aspects of empowerment and transformation within precarious feminine migration paths. It aims to contribute to a better understanding of how social contexts of domination can change migration experiences into acts of empowerment. In order to address this phenomenon, we shall articulate several epistemological angles of approach, one of which is the gender issue. Gendered interactions can sometimes slide towards domination and power relations. In specific social, cultural and family configurations, this phenomenon can become normative and supported by traditions. While in post-colonial contexts migration becomes a part of a struggle for power and domination between countries (Said, 2000), the same struggle can exist for individuals in family and/or social environments. In the case studies presented in this chapter, gendered relations of domination become a part of a collective history. They are transmitted throughout generations and thus create written, pre-destined trajectories. Through the analysis of migration narratives of women – African asylum seekers in France – we will point out the role of this type of domination relations within migration paths. These inter-personal configurations are structured around central male and female figures symbolically carrying an ideology of domination. When facing pre-determined life courses, migrant women are forced to take positions and to identify with or oppose to this ideology. Initiating precarious, sometimes illegal migration paths is the first step towards breaking this repetitive logic of submission.

#### THE RESEARCH – LIFE AS AN ILLEGAL MIGRANT

This chapter is based on an ongoing research developed in reference to the French post-colonial social and political present context. It focuses on biographical migration paths of women<sup>1</sup>, analysed from formative and educational perspectives, in the sense that they engage individuals in self-development processes. In 2010 France received 52,762 asylum demands (Marin & Belaisch, 2012), many of which were related to its colonial past. One third (33,7%) of these demands were made by women

(La Cimade, 2013). Our main focus is on precarious feminine migration defined as life conditions existent before and during the voyage, as well as once temporarily settled in the destination country. We cannot mention illegal immigrants' life paths without considering what this status implies right across their life history. Life conditions that illegal immigrant women are facing have to be analysed in both the surrounding contexts of the home countries and the voyages undertaken to leave them. The *emigrant* and the *immigrant* are two sides of the same coin marked by illegality and poverty (Le Blanc, 2010). Therefore, we chose to study narratives which retraced migration from single, individual perspectives, emphasising the role and place taken by their authors as they positioned themselves as empowered subjects of their life paths.

Through a qualitative perspective we will focus on gendered trans-generational domination relations participating in a reflexive, decision-making process, resulting in empowerment. As they are involved in emigration decisions, as well as in the structuring of migration paths, these patterns of domination become the incentive for learning and transformation dynamics. Our hypothesis is sustained by an analysis of three dimensions of migration pathways: (a) the experience of the emigrant wishing to leave Africa, (b) the voyage, and (c) life as an illegal immigrant in Europe and the projection for the future. Our decision was not to compare national social and cultural situations, but to try to understand individual choices and paths. By focusing on life stories of these migrants' *before* and *after* migration (Le Blanc, 2010) we have tried to identify some of the single modalities in which social reality influences all individual experiences. The assertive subject, deciding to take different paths and go against reproductive traditions, is at the heart of our analysis, structured on two axes: (I) the embedding of these atypical paths in specific decision making configurations and, (II) their progressive deployment through non-linear temporalities.

#### BREAKING PATTERNS TOWARDS EMPOWERMENT

Post-modern social and political evolutions are not limited to the Western world. In the social and historical context of the past century, they can also be seen through consequences located elsewhere. International and North–South migration flows illustrate how transformations of individuals as subjects of their existence become global and cross borders. Referring to modernity, Giddens (1991) had already mentioned “the self becoming a reflexive project” (p. 32). Indeed, breaking off with traditional patterns and pathways is associated with the image of a responsible individual, in charge of its decisions. More than ever before - as in Giddens' modernity – individuals are actors in their own lives. Projects of society thus become associated with a complex of single, self-projects, in which it is up to each person to position themselves as acting subjects within an adequate life course (Dubet, 2009). A double dynamic is thus at work. Life trajectories become more and more singularised, but also more fragmented and interrupted in times of crisis and transition (Beck, 1992). The advent of post-modernity combined with a new social and economic order has brought on new transitional forms. Economic and social change has an impact

on professional, personal and geographic displacements. Professional and marital transitions as well as mass migration are phenomena which reveal changes in individuals and society. Life domains in which individual subjects could engage in self development are less stable, durable and clearly defined as before. Professional and personal trajectories become less linear and individuals have to face various transitions and changes in the course of life. Furthermore, transitional forms are always accompanied by a loss of markers (Parkes, 1971). Change and uncertainty have thus become constructive psychosocial elements of personal identity. Migration dynamics stand for social transformation in native as well as in destination countries. Their patterns and the initiatives taken in order to fight them, depict global and social change carried out by individuals who decide to cut off from dominant pre-determined schemes. Migration is a form of transition that always begins with a choice between leaving and staying a home country. For asylum seekers, it appears that the word 'choice' can be an overstatement, because they can no longer bear the personal and political situations from which they are fleeing. Nevertheless, narratives show how different life story elements bind together and act as a trigger for the departure decision. This decision is a first act of empowerment for individuals, who until then, seemed to endure life events helplessly.

In order to define empowerment from an individual point of view, we begin with the notions of powerlessness and power. Power describes the capacity of a person or a group to produce effects on others. The opposite, powerlessness is created by the impression that one's actions will be ineffective on the course of life events<sup>2</sup>. On an individual level, the process of empowerment describes passing from powerlessness to the feeling of having the power to impact one's own life, the lives of others and to participate in social change (Gutierrez, 1990). Deciding to quit, to change, or make a transition is effectively taking over power over one's life and becoming an acting subject, as opposed to adopting a form of imposed passivity. This means passing on from a state of *object* of life circumstances to one of an empowered and thus assertive subject. Philosophy gives two contrasting definitions of the latter. On one hand, the original subject, the (1) subject as a foundation for reason and action and on the other hand, the subject as a result of cultural processes, the (2) *subjectus*, a political subject submitted to society and culture<sup>3</sup>. In the present context, migration is for some individuals the only opportunity of changing their status from *subjectus* to the original founding subject. Migration is the first step in this process of resistance, and the act of empowerment facilitates this transformation process. Nevertheless, transformation must always be preceded by a self-reflexive act on one's condition.

Once submitted to society and culture, individuals find in migration the possibility to apprehend society and culture in an act of empowerment. Two aspects of our research converge towards this analysis. First of all, migrant women's narratives show that one of the main elements of the decision to flee is disagreement with certain religious and/ or cultural precepts of their home society. Far beyond living with a violent husband or a repressive family, it is the social and cultural basis of these situations that are truly contested. What is common to all the narratives we

gathered is the condoning of a society sustaining this type of public and private behaviour. Thus, the quest of migration is a radical one: for a different place for individuals within society. It is a quest for one's own subjectivity. The purpose is not to make *tabula rasa* of the socio-cultural past but to aim towards a different and better future. Secondly – once arrived in France – administrative procedures, contact making, and finally surviving, become the next, urgent matters. Migrants are immediately submerged in a complex administrative system, which is the first step towards becoming an active element of a new society. A different form of subjectivity emerges through this empowerment and their voluntary involvement in a new socio-cultural environment. The encounter with a new cultural universe permits the development of an acting subject. At the core of this phenomenon is the choice of breaking with a dominant social and cultural pattern and discovering otherness. It is a form of subjective resistance contributing to the emergence of an assertive subject. In migration, empowerment and transition are thus inter-related. The lack of identification with former cultural frameworks in a new socio-cultural system necessitates an important reflexive, biographical process, undertaken during immigration in order to compensate. Thus, each individual and each single life path carry within them the mark of social transformations surpassing them but of which they are a part of. As they become part of single biographies, social experiences connect the past to the present and create the premises for the future.

#### PUTTING AN END TO COLLECTIVE TRADITIONAL LIFE PATHS

Precarious and illegal migration resumes its essence through a rupture with the socially prescribed. It recalls transitional forms where constraint and ideology combine to set up decision-making processes of emancipation. These apparently lonely journeys begin within complex decision-making configurations in which collective and individual aspects, anticipation and risk-taking, bind together in unique ways. Concerning the emigration period, the notion of decision must be analyzed through the prism of the individuals' interpretation of the traditional cultural and social elements they were influenced by. This way of apprehending life contexts reveals the first elements pointing towards the initiation of these atypical life choices.

The women we interviewed had left their countries for reasons related to marital life and personal safety. Facing forced marriages, mostly imposed by family members, they chose a radical break with the past. However, this also meant leaving behind a collective history, a common destiny, which they tried to escape from:

[...] my mother. She was opposed to this marriage, she was herself forced to marry my father. It goes from generation to generation. (Aissatou, age 19, Mali)

Individual experiences are a part of a collective and trans-generational experience. Throughout generations, a collective trajectory seems to be passed on. Synchronic as

well as diachronic passing down allows collective history steep in individual experiences and for the latter to be reflected into common destiny. These atypical migration patterns break the trans-generational continuity and throughout migration narratives we can thus observe not only the ways in which collective heritage is appropriated par individuals but also the ways some of them chose to break with it. Feminine figures are thus recurrent in the narratives. Mothers, friends and cousins are often evoked in order to illustrate what is perceives as a social issue. These characters narrate the narrative's author's life story by their presence and role as identification or distinguishing figures. While some of them have chosen the same type of path and left the African continent, other have followed traditional patterns, such as arranged and forced marriages:

So I came to Spain. because I have a sister who lives there too, who is married. She has a son. She also left Mali through Guinea, then Guinea Bissau and then Spain. Because she heard there was a border between Guinea Bissau and Portugal. So she took the bus to Portugal. Once arrived, she came to Spain. She took another bus to Spain. Now she's over there, she met her husband. She also ran away because of this marriage thing. (Awa, age 20, Mali)

In the narratives, the imposed legacy of forced marriages is perceived as unfair and becomes the reason of a hasty escape. Native countries and societies are described in an accusatory and critical manner when regarding marital institutions and traditions and their role in restricting women's freedom of choice. This kind of representation is identifiable in family stories where male figures – such as the father – embody a set of unfair social difficulties:

[...] My father wanted me to get married. I knew this because my father is polygamous. He has two wives. So [...] I had seven sisters. Of the same mother there were three, but of the other women there were four. (Awa, age 20, Mali)

It was my father and his family who forces me to marry a man over 46 years older than me. (Aissatou, age 19, Mali)

Family traditions are presented in the narratives as the reflection of traditions existing on a larger social scale. Narratives denounce society and its ever- applying rules which seem to be present in each family affected by by arranged marriages. Individual and family stories are embedded in social, cultural and historical configurations. As stories of self above all, migration narratives thus reflect the perception of individuals in regard to the social injunctions in their lives.

The sometimes militant opposition to these pre-written trajectories denounces an existence where the weight of society seems to be, above all endured. Narratives thus come to stand for principles and moral values, different from those of the male figures evoked. What is argued is the social place attributed to women in the native societies. Through forced marriages they seem to be assigned a condition of wife and mother, perceived as restrictive. Personal ambitions, a wish to study or work seem to be dependent on the will of another person, a will itself imposed without



any possibility of choice. That is where the essence of domination patterns lie. Under such conditions, the first obvious solution is to escape. In regards to escaping, narratives of such atypical trajectories generally reveal fluctuating temporalities. The to and fro between the past, present and anticipated future are recurrent themes. Our analysis of the narratives implies two aspects: discourse and action, articulated around the notion of a biographical event. Linking subjective reality to the discursive one (Leclerc-Olive, 2003; Bourdieu, 1994), biographical events point out the central moments of the migration paths, those which are most important for the individual in the here and now of the narrative. Such events can reflect actual situations but also more diffuse moments referring to intense feelings or thoughts (see Figure 1). Their position in the discourse and their temporal display retraces the pathway differently, far from any chronology, following a subjective logic. What characterises precarious migration is the often unstructured nature of the narratives. The fluctuation between the past, the present and the anticipated future shows ways in which the complexity of these emergency pathways is being appropriated by the individuals concerned:

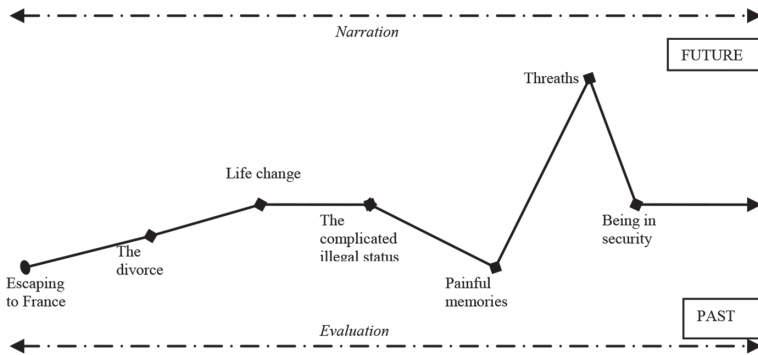


Figure 1. Migration path reconstruction with biographical events. Adja, age 32, Mali.

Faced with the necessity to escape, little anticipation is possible. Lonely journeys, these paths of exile imply nevertheless the involvement of complex networks of support as well as help from family and associations. They are individual and unique stories, yet they are written collectively. On one hand, this is related to the conditions and reasons for departure and on the other hand, it concerns the concrete developments along the voyage. The collective aspects influence on the organization, the deployment and finalization of such migration trajectories. They create the motivational premises of departure and orientate decisions at each step of the way. In this collective perspective, narrated experiences become those of many women subjected to the same socio-cultural and political context.

Narrated feminine migration is thus a story of women. Among those who have chosen similar types of paths, collective support strategies are put into place. Migrant women will often help others through the journey through Africa and Europe:

Yes, my sister is here. She is the one who helped me come too, with her identity papers. Otherwise, it is very difficult to leave the country. Yes, very difficult. (Awa, age 20, Mali)

Once in France, illegal immigrants and asylum seekers often find help and advice through women having already surpassed this experience. Most of the information transmitted through migrant women's informal networks and groups concerns migrant aid associations, accommodation and work opportunities. Regardless of original nationalities, age or situation, similar life experiences unite migrant women during their immigration period. According to the narratives, a common definition of migration as a quest for self existence seems to ad up to the illegal status and its material consequences, creating a diversity of forms of mutual support.

#### ENGAGING ON SINGULAR PATHWAYS

As individual trajectories nourished by collective history, biographical narratives of precarious feminine migration reflect a genuine time fragmentation. They depict a reactive restructuring of migration pathways. Emigration means above all searching for security, which guides the entire approach. Telling the story of one's migration trajectory thus equals to stating the role and place of the migration process in the context of a life course. Emigrating – despite the illegal and dangerous conditions – appears to be a way of reacting to an unbearable situation. Biographical events re-structure the narratives and reveal a subjective configuration of the migration paths in which migration becomes a project, for self, and against imposed circumstances. Life histories thus have the role of expressing the side of migration often forgotten behind the survival difficulties related to being an illegal immigrant. Subjective time, space and human relations found in the narratives reveal precarious migration, not only as a way to escape, but also an act of empowerment against dominant and pre-determined social patterns. This diversion of the narrative function reflects postures of action in a strategy where survival requires taking risks in the context of emergency (Heinz, 2009). The serialization of central moments and events of the migration pathway bring to light specific periods that break with typical linearity. Life courses are then retraced in a subjective order placed under the sign of action. The socio-historical temporalities of precarious migration are those of a transition between two realities of the subject, transition made possible by an act of empowerment. While the dominant discourse of marriage and women's role continues to be disseminated, new configurations related to international mobility facilitate insights and allow taking on uncommon approaches. The continuity of these approaches and their success depend primarily on the subjective and individual commitment. Dealing with life in illegality and with precariousness requires individuals to (re) position themselves proactively:

If I have my documents in order, future will be better for us, really. Because I will work, I will get a diploma. I will work so I can make it. What I really,

really need is my legal documents. I know I have the capacities to do a lot of things, but without them, it is not possible. If I have my documents, I could go work tomorrow! Whatever the job, I will do it. I will do it so I can make it. That is what I really need. Right now I can only think about working, working, working. (Adja, age 32, Mali)

Therefore, more than running *from* something, such migration patterns signify running *towards* something. Their guiding path is the search of security, but they seek freedom of thought and action, typically opposed to dominant ideological contexts:

Still their ideology does not change. So I do not know if I can really make them understand everything. I would be happy to do so, but I cannot. I cannot make them understand because these are ideas which last from ancient times. (Adja, age 32, Mali)

Emergency pathways signify the desire to break with a dominant typology of pre-existent trajectories. When implemented, they are the first act of empowerment for individuals who previously seemed to be subjected to the consequences of a socio-cultural and political context (Gutierrez, 1990). Migration is a dual path. Authentic life project, it also involves a specific self-securing aspect, but also the identity project of rediscovering oneself. It is based not only on a real concern and fear, but also on a failure of identification with moral attitudes imposed from the outside, by family and society. The ideological dimension of precarious migration plays a central role in the place taken by these pathways as formative projects for the subjects concerned. Far more than living the experience, achieving a form of self (trans)formation implies having a reflexive perspective on that experience. This can mean being outside the socially prescribed and the repetitive, placing oneself against a dominant authority and away from family identification figures. If no convergence can be reached between a pre-written life and personal beliefs, migration is seen as the only way for being oneself. This means creating one's own ideology, one's own path:

[...] here I feel really protected. I feel protected from all their ideas, all that could have reached me over there. I know I 'm having problems here, but really it is not like out there. Here I especially have money problems, for food, for clothes but I am struggling to have at least the minimum. But out there it is a problem of life itself. (Adja, age 32, Mali)

Escaping to Europe is the starting point of a subjective imperative, which itself is the first step into a long process of transformation and socio-cultural learning. Through the different phases of the pathway, different postures of the self are highlighted. Emigration becomes an act of resistance, of empowerment, generating a redefinition of the subject. While positive or negative, transformation is inherent in any transition (Parkes, 1971), precarious migration is a transitional period particularly characterized by empowerment. Improbable journeys by illegal migrant women

carry acts of resistance against a prescribed condition of liability (Strozier, 2002). Militant pathways start by saying *No!* (Delory & Niewiadomsky, 2009) and by an imperative of distinguishing oneself from values impossible to identify with. The main goal of undertaking these pathways is to recreate the internal coherence lost when their original life context has ceased to correspond to personal projections. Transition comes to be accepted and integrated as an act of emancipation that repairs a rupture and rebuilds a balanced identity. By being interpreted this way by the migrants, transition becomes a driving force of the transformation process. It is this proactive way to be in migration that allows its continuity and achievement.

Forcing individuals to face the socio-cultural unknown, migration is a time of great biographical alteration. The past and present are analyzed and reconfigured in the hope of providing a coherent future. Adjustments are made in the pursuit of the good position to adopt. It is a way of gaining the ability to act upon a redefinition of self, made possible through ongoing internal negotiations. Delory-Momberger (2009) calls this a « transition work » (p. 63), but we could also call it a work in transition. It refers to the fact that due to the work of re-appropriation and reconfiguration of their life paths, individuals become subjects of their own socialization. Thus, not only biographical transition is produced by a form of agency in regards to the original project, but it also results in such a form, throughout the implementation of that project. Deciding to migrate is a way of acting upon one's life by changing life's environment. Once this happens, the omnipresent change will necessitate continuing being an active subject in search of an identity, balanced between psychosocial aspects of the native country and those of the host society. Capacities for action and the postures of self will be limited or altered by the social environment. Subjects find themselves obligated to negotiate and constantly operate self (trans)formation.

#### FROM EMPOWERMENT TO TRANSFORMATION

Migration life stories are the narration of these (trans)formation processes. They tell the story of individuals dealing with change and transition and confronted with otherness. As they cross social and cultural environments they face frontiers of gender, culture and social belonging. They also break borders confining them to moral values they do not identify with. Biographical narratives of feminine precarious migration describe the process of breaking these borders by acting upon their social environment and condition. They tell the story of a changing subject, of an individual refuting a social reality and context. Even though they are expressions of single individuals, biographical migration stories carry the marks of social and cultural patterns embodied in each person. In the here and now, with a new perspective, the women interviewed have thus revisited their past along with the social reality it contained. Through a biographical performativity (Alheit & Dausien, 2005; Delory-Momberger, 2006), social past is re-organised and re-structured in these narratives, due to the viewpoint adopted by the subject. While re-memorising past experiences,

an entire social and cultural universe is being re-memorised. Temporalities change and fluctuate; some events prevail while others are forgotten.

Nevertheless, narrative display of events and situations reflect above all the meaning they have and the role they play in life courses. Different meanings, at different times, show, for each migrant woman, a transformation in progress, an evolution in understanding one's inner reality; a subjective journey from one attributed place to another, chosen freely. Migration thus appears as the voyage of a lifetime, a project for self, but also a project in reaction to submitting and dominating circumstances. It is the biographical framework for a change of social and cultural position and role. For the women concerned, it is the quest for overthrowing pre-established domination patterns and gaining a different role and posture in gendered, social and cultural schemes.

#### NOTES

- <sup>1</sup> According to the United Nations 50% of the world's asylum seekers are women. This proportion has been constant for the last ten years (www.un.org).
- <sup>2</sup> Definitions of power and powerlessness are discussed by the Cornell Empowerment Group (1989, p.2) and Keiffer, 1984. Cited in: Hutchison P., Lord J. (1993) The Process of Empowerment: Implications for Theory and Practice. *Canadian Journal of Community Mental Health*, 12:1, spring 1993, p. 5–22
- <sup>3</sup> Definitions mainly discussed by I. Kant in *Critique of pure reason* and later used by Descartes in the 19<sup>th</sup> and 20<sup>th</sup> century. Cited in: Strozier, R.M (2002) *Foucault, Subjectivity and Identity. Historical Constructions of Subject and Self*, Detroit: Wayne State University.

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*Letitia Trifanescu*

*EXPERICE*

*Paris 13 Sorbonne Paris Cité University*

*France*



BARRY GOLDING AND LUCIA CARRAGHER

## 8. COMMUNITY MEN'S SHEDS AND INFORMAL LEARNING

*An Exploration of Their Gendered Roles*

### INTRODUCTION

Our general intention in this chapter is to explore some of the gendered aspects of learning that have been recognised through the creation of the community men's sheds movement during the past decade in four countries. It includes a new and critical exploration of women's historic and current role in the community men's shed movement across four nations to 2014. It is timely that we revisit and expand on our early and tentative observations (Golding & Foley, 2008; Golding, Kimberley, Foley & Brown, 2008) about the emerging role of women in men's sheds, at a time (in 2014) when the movement has grown and significantly expanded, including beyond Australia, to Ireland (Carragher, 2013), the UK and New Zealand.

Men's Shed-based organisations, now flourishing and spreading in community settings across over one thousand sites in these four countries are already changing theory and practice in men's informal learning, particularly for the significant proportion of men not in paid work. Golding (2014b) recently invoked the idea of 'shedagogy' as a distinctive, new way of acknowledging, describing and addressing the way some men prefer to learn informally in shed-like spaces mainly with other men. Thompson (2014) recently observed that:

The learning that occurs in sheds is of interest to educators and education policy makers because the sub-group of men who attend sheds are often significantly under-represented in, and often resistant to, participation in both formal education and training and non-formal classes. (p. 12)

The significant under-representation of men in adult learning was first comprehensively explored in the UK by McGivney (1999). The first acknowledgement of ways of addressing this issue through adult education by the Australian adult education sector came several years later in *Bringing in the blokes* (LCL, 2002) following a review of support services by men in Western Australia (FCS, 1999). Our research advances in this field of informal learning by men not in work, including perspectives from seven diverse countries which were summarised in Golding, Mark and Foley (2014).



*Men's sheds*, by that name in community settings started as recently as 15 years ago in Australia, coincidentally around the same time as McGivney's (1999) research in the UK, and totally independently of the adult education sector, but consistent with many of the principles for improving male participation in learning through community neighbourhood and learning centres, as identified in the 2002 report, *Learning Centre Link* (LCL, 2002). Some of our chapter includes a careful examination of how these gendered roles in learning came be acknowledged and addressed by men *and women* around two decades ago. It includes consideration of the important but often-subtle roles women have played in men's informal learning and wellbeing through the creation of individual sheds and the Men's Shed movement.

Research through men's sheds (Golding, Brown, Foley et al., 2007) confirms that when men do participate informally, particularly in communities of hands-on practice that are social, local and situated (Golding, 2011a), they are likely to informally learn across a wide range of life, learning and wellbeing domains and thereby gain considerable benefit. Our chapter's emphasis on informality is consistent with Coombs and Ahmed's (1974, p. 8) contention that informal education is 'the lifelong process by which every individual acquires and accumulates knowledge, skills, attitudes and insights from daily exposure to the environment – at home, at work, at play.' Indeed, important aspects of all three are embedded within a community men's shed setting.

This chapter explores how this community-based, grassroots international movement, embedding but not naming or foregrounding either learning or wellbeing, came to be created. It shows how the movement was advanced from its earliest times, not only because of the collective action of and by men themselves, but also because of the critically important leverage of and by women.

### *The Basics of Men's Sheds*

Golding (2014a) comprehensively summarised the role of community men's sheds in facilitating informal learning. The critical condition is that men are not treated by the organisation, or by the women involved as customers, patients, students or clients from negative, deficit or ageist models. While the shed movement started slowly and from small beginnings in parts of Australia, its very recent and rapid spread is evidence of what can and does happen when men exercise agency, and when governments listen to and work with men rather than problematise or patronise. As Golding (2014a) recently acknowledged:

On one hand, sheds are conservative in that they reinforce and celebrate some traditional ways of being a man and doing things together, 'shoulder to shoulder'. On the other hand they are radical in that they are based on models of community involvement that are democratic and inclusive, which eschew negative and hegemonic masculinities, are respectful of women, promote of salutogenic (health promoting) behaviour and encourage earner autonomy. (Golding, 2014a, p. 126)

Golding (2014a) stressed that men's lives and needs beyond paid work, as well as men's sheds, are complex and diverse and do not fit neatly into one neat 'box' amenable to provision of services by professionals for clients. What sheds paradoxically demonstrate is that learning and wellbeing sometimes work very well for some men when they are interconnected, not named up front, and not provided in a typically individual, client-based, service delivery model presupposing on men's deficit.

While it is important in principle (and enforced by equal opportunity legislation in many nations) that *all* men are welcome, in reality, as in many community organisations, some men's sheds organisations inclusive of older men from conservative backgrounds need reminding about the need for including other groups: of Indigenous, gay and bisexual men and men from diverse religions, countries and cultures. While discrimination on the basis of race, religion and sexual preference in most nations and organisations is illegal, so too is discrimination by gender. Men's sheds justification of their mainly or 'just men' stance has been endorsed by the Australian Equal Opportunity Commission, using the argument that this configuration is consistent with interventions that improve men's health and encourage social and community connection of men not in the workforce. This stance also has widespread support from partners, children and families of men involved, as well as women involved professionally in learning, health and welfare, on the basis that many people (including women) benefit, aside from the men themselves. It is also consistent with the theory and practice of men's agency over their own, essential informal learning, and a concern for other men's learning and wellbeing through the men's shed.

This idea of men talking and doing in community sheds is not unimportant as a starting point to deeper and more meaningful conversations and shared activities. Tse (2005) extracted three main themes through research into older people's needs for activity and companionship through adult day activity groups in Australia. The importance of companionship, including being and talking with others was one of the themes, as was keeping occupied and 'getting out of the house'. Other research confirms the importance also to women of having places and spaces to converse or 'natter' ('chinwag' in England; a 'bit of *craic*' in Ireland). Talking socially without exchanging too much information is an important way of people making contact, an activity that now extends to online communication, including between men in 'virtual sheds' (ShedOnLine, 2013).

#### SHEDS, LEARNING AND GENDER

##### *Did Men's Sheds Come out of a Men's Movement?*

How men's sheds actually started, and particularly the role women took in the development of men's sheds in Australia, has not previously been explored since Golding and Foley (2008) undertook an exploration of gender roles associated with

men's informal learning in community men's sheds, At that time men's sheds and the associated shed movement were relatively young, and had not spread beyond Australia. We identified at that time that men's sheds had not 'come out of any particular academic or political 'men's movement'', though the narratives of participants came closest to espousing views consistent with what Karoski (2007) called 'Inclusives', in his four part Australian men's movement typology. This Inclusive position accepted that:

It is essential to the well-being of the whole society that men make themselves healthier and more fulfilled. ... [U]ntil men make themselves physically emotionally and spiritually the whole society will not function well, because men still hold the hegemonic position in society. (Karoski, 2007, p. 216)

Karoski identified three other Australian men's movements at that time: the Profeminist<sup>1</sup>, 'Fathers rights'<sup>2</sup> and Mythopoetic<sup>3</sup>. It is of some interest that men's sheds were not mentioned in Karoski's thesis, though by that time the movement had become national in Australia.

By 2008 we also made some comparisons of the gender issues around the creation of neighbourhood houses as learning centres for women in the 1970s, and men's sheds from the late 1990s (Golding, Kimberley, Foley & Brown, 2008). Underpinning this work was a recognition that while the men's sheds movement, at least on the surface, was a men's sector, mainly for and by men, women had clearly played an important, if understated and poorly acknowledged role. In the process of comparing community houses (mainly providing vocational pathways for women returning to the workforce, from the 1970s) and men's sheds (mainly for providing post vocational life skills and opportunities for re-creation for men leaving the workforce, from the late 1990s), we asked about the desirability (or otherwise) of sheds being totally or mostly for men, While there remains no simple answer about what is 'best' or 'right', some of the solutions developed in practice to this typically unspoken about gender dilemma in informal learning are important to record and critically analyse.

Because one of us (Golding) is based in Australia, and one (Carragher) is based in Ireland, the insights from the section that follows come mainly from these two nations. Nevertheless we have sought to gather other evidence about some gendered aspects associated with men's sheds also from the UK and New Zealand.

### *Women and Men's Sheds: 'The Elephant in the Room'?*

Golding's (2015, forthcoming) research into the Australian genesis of the earliest men's sheds has unearthed some new evidence to refine our earlier hunches that women had played (and continue to play) a much more important role in the genesis and development of men's sheds than had previously been recognised. This new data comes from both very early and very recent men's sheds. The metaphor in our section heading, we think, is a very useful one to bring to the situation that we

are elaborating on in relation to men's sheds and the typically overlooked role of women. 'The elephant in the room' is an:

... English metaphorical idiom for an obvious truth that is either being ignored or going unaddressed. The idiomatic expression also applies to an obvious problem or risk no one wants to discuss. It is based on the idea that an elephant in a room would be impossible to overlook; thus, people in the room who pretend the elephant is not there have chosen to avoid dealing with the looming big issue. (Wikipedia, 2014)

If we look closely at the current (October 2014) situation of men's sheds there are now over 1,000 sheds open in the world, and the expansion continues. While at least three quarters of those shed-based organisations registered with national associations are in Australia, close to 350 are now open elsewhere – in Ireland, the UK and New Zealand. An analysis of shed names (registered by the respective national associations to early 2014) shows some clear trends in terms of gender identification at an organisation level. While 13 per cent of all shed names in Australia and eight per cent of those in New Zealand do not include the word 'men', a small number in both countries use the term 'Bloke' instead. Only one (of 198) sheds registered in Ireland to late 2103 did not use the term 'men'. Fifteen per cent of Australian sheds included the term 'community', through most of those that did (80%) also include the term 'men'. In essence, most but not all present day men's sheds in these four countries publicly identify (in their organisation name) as being mainly for men and by men. While the first shed to officially open with 'men' in the public name of the shed appears to be the Lane Cove Men's Shed (in Sydney Australia), which opened in late 1998, there was still a reluctance by some of the earliest (pre 2005) sheds to name it as *Men's Shed*. As the sections that follow confirm, this reluctance and women's role in men's sheds is actually more complex and interesting than the name of a shed might suggest.

### *Turning the Shed Clock Back to 1986*

In order to explain the role women currently play in facilitating informal learning in many community men's sheds, it is useful to return to debates three decades ago about whether services for men, including for adult education, should be gendered. Our reason for re-examining these debates now is that many of the same debates occur whenever a new men's shed plans to set up in a new place, community or country including through or with the support of an adult education organisation. To set the broad scene for a careful analysis of the very first shed in a community setting (simply called 'The Shed', set up by a rural centre for ageing in Goolwa, South Australia in 1993), we 'turn the clock' back to South Australia in the mid 1980s, where for very good reasons, women's issues and feminism had come to the fore since the 1960s. The women's movement had made huge advances in many other relatively developed nations related to gender equity during the latter part of the last

millennia, after hundreds of years of men's domination and hegemony over many areas of service provision and public life, including in adult education in Australia through the community house movement from the 1970s (Golding, Kimberley, et al., 2009). Until this occurred, many women were missing from the public record, including many areas of work, adult education, the media, politics and public life.

The move towards gender equality, still incomplete even in relatively progressive and enlightened nations, took over a century of struggle. As an example in South Australia, where many of the earliest men's sheds started after the late 1990s, women first got the right to vote and stand for state parliament in 1894. However it took 65 more years (until 1959) for the first South Australian woman to be elected to the Australian parliament. By the 1970s services for some women and by some women had become widely accepted as being effective, necessary and important. For all of these reasons, for some women, men and communities, the call by the 1980s for male gendering of places to provide some services for and by men, including encouraging men to learn informally though other men, felt like giving up hard won gains for women's equality.

As a powerful illustration of the way things were changing by the mid 1980s, in Australia, a 1986 'Linking Men's Services' (LMS, 1986) conference was held specifically to discuss the provision of services for men in the context of major social change for men in South Australia, including:

... changing patterns of employment, long-term unemployment, changing patterns of family life, the rise of the divorce and separation rate, and the women's movement with its questioning of traditional sex-role stereotyping and particularly male dominance in society, [which] has led many men to reassess their identities and roles. A special case of this is the men who came back from the Vietnam War with their perceptions of life permanently changed. This change process, while positive, is not without its share of stress, change and pathology. Reflective of these stresses is the growing interest in the development of programmes and services targeted directly at men. (LMS, 1986, p. 3)

This 1986 conference was, 'to the best knowledge of the organisers ... the first conference of its type in Australia' (LMS, 1986, p. 3). The organisers were careful to stress that the conference:

... was not conceived as a forum for men to vent anger at particular women, or the women's movement in general but [as] a serious attempt to address difficulties confronting men in today's society and to link services trying to meet these needs. ... Increasingly it is being recognised that many social phenomena classified as "women's issues" *cannot successfully be addressed without including men in the solutions.* (p. 3, italics added)

The State Minister who officially opened the 1986 conference in South Australia pointed to a number of good reasons to 'focus particularly on services for men',

including 'gender differences in rates of sickness and death', 'changing roles in domestic and work scenes [that] require considerable adjustment by men' as well as differences in the use of services by men and women' (LMS, 1986, p. 3). In that year, 1986, men's average life expectancy in Australia of 71 years was significantly less (by seven years), than for women. It is of some note in retrospect that the life expectancy for men in 1986 was only one year older than the recently (2013) revised retirement age of 70 years, at which age people born after 1965 will become eligible for the Australian age pension from 2035. By 2012 in Australia, average life expectancy had raised to 82 years. This drawing out of life expectancy in Australia, including for older men, is an important background to the development of shed sheds. There was a slow and wider acknowledgement of the need for men to learn informally and share knowledge about life in the decades they might anticipate beyond paid work, in order to stay well and independent as long as possible. There was a similar acknowledgement about learning *through* life occurring elsewhere, including in the UK (Schuller & Watson, 2009).

None of the many presenters at this 1986 conference even mentioned *backyard* sheds for men as an adult education, health or other intervention, though it is possible to retrospectively find pointers for what was to follow in community men's sheds during the next decade, including from presentations that focused on why men then used community health services and adult education around half as much as women. There was a perception, based on some local research reported to the conference, that while some of the differences observed in men accessing services was about accessibility, opening hours and need, much of it was about prevailing male stereotypes, including men not admitting to illness, vulnerability of failure, and being afraid of becoming involved with professionals, including teachers in formal, classroom or clinical settings.

A health service reported to this 1986 conference that it had experimented with a range of services and programmes targeted specifically at men, including for violent and isolated men. It reported coming up against some men who had expressed 'resentment of the women's movement' (LMS, 1996, p. 23) and felt 'threatened by the new breed of women, particularly if they want to maintain a traditional male-role' (p. 24). It concluded that 'men's questioning of traditional role-definition and the need for them to adapt to a changing social and economic climate has created a *need for services designed specifically for men*' (*italics added*).

The 1986 conference proceedings summary records that there was a 'preponderance of professional service providers', and that 'Some regret was expressed that more "ordinary" men were not present' (LMS, 1986, p. 133). One of the three main issues identified in the 'Where to from here?' plenary session at the end of the conference was the still perennial, 'Elephant in the room': 'The involvement of women'. While some participants suggested that 'it was very necessary for women to be involved because at present they are providing many of the services for men', there was 'a general feeling that in the future it would be valuable to have men only groups and/or gatherings' (p. 134).

Our point in drawing out these prescient observations from this important, first meeting of mainly men's service providers, almost three decades ago in South Australia, is to stress that men's sheds, including a recognition of the need for *some* men's spaces for *some* men (that we stress in Golding, Mark & Foley, 2014) did not magically 'come out of nowhere'. They were created by 'normal' men *and* women, including with the support and encouragement of some professional service providers that what they were doing was not working for men. They were deliberately created mainly *for* men because of a deeply perceived need, including from professional service providers dissatisfied with the *status quo* for older men. Importantly, they did not, with some minor exceptions, spring from any of the men's movements or adult education providers of the day.

### *Some Gendered Dimensions of Service Provision for Men*

This section briefly discusses why being a *men's* shed was (and remains) such a 'big deal' for many communities, adult educators, service practitioners and governments. Research into fatherhood and family services from the UK in 2000 provides a neat and relatively simple way of explaining this difficulty. Summarising research by Ghate et al. (2000), Ruxton (2006), in a report for Age UK, identified three types of centres that provide services:

... the '*gender blind*' (where men and women are treated the same)' the *gender-differentiated* (where men and women are treated differently) and the *agnostic* (which has no identifiable approach to working with men. ... [W]hile the first two were more effective, *having a strategy was more important than what the strategy was*. Rather than be prescriptive, [it is better for] providers of services for older people [to] develop a strategic approach to working with older men that is appropriate to their individual circumstances and the needs of their communities.

Ruxton acknowledged that the majority of Age Concern's service users ... tend to be older women', and suggested that there was a need 'to develop more clearly gendered approaches to outreach, particularly with older men who are socially isolated' (p. 25). However Ruxton's message to service providers began very cautiously. Ruxton noted that developing 'activities that are attractive to older men ... posed the danger in reinforcing stereotypically 'gendered' activities'. However Ruxton also acknowledged that:

Although men-only groups are not attractive to all men, they have a place in a menu of options. For some men they provide vital encouragement, support and friendship in a safe environment. Having the space and autonomy to initiate their own activities is crucially important for some older men. (p. 3)

What has been most difficult for many (typically female) service providers to accept in adult education (as well as health, aged care and welfare, is that by treating all



men and women in the same way (using Ruxton's 'gender-blindness' strategies), as well as providing other compensatory services mainly for and by women (effectively providing 'gender-differentiated' services only for women), some men's needs, including those dealing daily with the 'life or death' issues, of informally learning about and making sense of later life and staying well, were neither properly accommodated nor even recognised as being gendered.

What the men's shed model does that is different, indeed revolutionary, is still too difficult in 2014 for some service providers, including adult educators in some other countries, to accept or adopt for three main reasons. Firstly, the men's shed model uses (and arguably reinforces) the attraction of a stereotypically male-gendered activity (men's sheds) in order to help some men, particularly older men and other men not on paid work, to be empowered and to look after themselves, each other and their local community. Secondly, the typically female service provider, including adult educator, is put at arms length by fundamentally changing their relationships with men. The male role changes from being a client, customer, patient or student of the professional 'service provider', to becoming an active and equal participant in a community activity. Instead of the provider servicing the client from a deficit model, the shed environment itself becomes *salutogenic* (health promoting and giving), and the men become mentors for other men and agents of their own transformation. Thirdly, the men's shed works precisely because of the informality of the setting and the activity, not in spite of it, and particularly because this informal activity is not named. The learning occurs *in spite of* there being no teachers, program, curriculum or assessment.

*What Else Was Changing for Men in Australia During the 1990s That Led to Men's Sheds?*

While much of the early action in the community men's shed 'space' before 2004 occurred in South Australia things were changing elsewhere in Australia. There is evidence that some health literacy and adult learning providers during the early 1990's in Australia were beginning to question some aspects of the female-gendered nature of their provision (as exemplified by 'The Shed' opened in 1993 in Goolwa, elaborated below), and taking small but deliberate steps to try and address the needs of some groups of mainly men. As an example from Australia's capital, Canberra, an article in *The Canberra Times* (22 Feb 1992, p. 40) headed 'Men-only groups confront a social phenomenon' discussed Southside Community Centre's 'fortnightly men's group for over 60's', with activities that included 'discussions, picnics and visits to cultural and historic sites'. The rationale for setting up the small (five person) men only group was explained by 'Margaret' who delivered games at the Centre for the Hungarian Australian Club.

About 90 per cent of our clients, are women, and we have no trouble getting them to join in groups and activities. But somehow we just haven't been able to get this men's group off the ground, and I can't say I really know why.



‘Dudley’, one of the male ‘clients’ in this Canberra program, was sceptical. “I said it from the start. ... You’ll never get a men’s group off the ground. It takes women to get this sort of thing organised.” This is both illustrative of the ambivalent context in which the first community men’s sheds were ‘invented’ later the same decade, and accurate in terms of a recognition that while *some* men needed some men’s informal learning spaces, women were perceived as critically important to get some of the ‘stuff organised’.

### *Women’s Role in the First Sheds*

We turn next to a professional woman’s own insightful words, below, about the genesis of ‘The Shed’ in Goolwa, perhaps the first in the world, created in 1993 by a rural centre for ageing six years before the first named *Men’s Shed* in late 1998. All three sources of inspiration this female aged care professional, Maxine Kitto, acknowledged for this first shed have both personal and professional gendered dimensions.

Maxine Kitto’s acknowledged in 1996 that concept of The Shed in Goolwa was developed from three sources of knowledge.

1. I attended [a conference in 1986 in Adelaide, referred to above, about Linking Men’s Services and] was in a minority group of [5 female amid 300 male] community workers. [At that stage] the vast majority of community and health workers aimed at assisting women. The “macho” image of “I’m alright mate” was still evident, especially in the minds of funding bodies.
2. Six months after attending the [Goolwa] Heritage Club to observe the custom of men driving their wives to the Club for services and then waiting in the car park. With up to a dozen men in the car park, unless they had previously met, there was no social interaction. They usually read the paper, with every man keeping to the territory of their own car. The same wives of those men soon became widows who we supported and provided transport. The women inside the Club were healthier than the men in the car park.
3. My third key source of knowledge was my Dad. I grew up in an average Australian family where Mum’s territory was inside the house and Dad’s territory was the shed. Dad still knows where every jar of nails and screws, or hammer and saw belongs in his shed. It is where he feels comfortable, it is where he continues his role as the handyman, the fixer, the craftsman, and it is where he goes to get away from it all (Kitto, 1996, p. 1).

### *Naming the Shed as a Men’s Shed*

*Men’s* sheds, by that name, first began to open in Australia six years after *The Shed* in Goolwa, above. During the first five years, from 1999 until the national movement was acknowledged in Australia after 2005, most sheds faced many of the same issues

naming the shed as a men's space as identified in the 1986 conference. Surveys about the gendered nature of sheds as part of our 2007 Australian research (Golding, Brown Foley et al., 2007) confirmed three broad categories of attitudes towards women in men's sheds. Around one third of men came to sheds with agendas that completely precluded the idea of interacting with or being inclusive of women in the shed. Around one third of men tolerated women as part of the shed organisation on condition that they could behave 'like blokes' (men). The remaining one third of men suggested that they would and should be equally accommodating of both men and women in the shed, though most acknowledged that this was to keep women, the community and funding bodies 'on side'. However other findings in the same study about shed effectiveness confirmed that for men with most difficult lives, health and family circumstances, being in a men's only space in the shed itself was an important part of the shed's 'recipe' for success.

Despite common (and continuing) concerns from a minority of shedders about why women might be involved in men's sheds, most men acknowledge that participating with women's (typically their partner's) active support and encouragement is in their best interests. While men's sheds make a local decision to include women as participants (or not), it is widely acknowledged that women have played major roles in developing and championing many sheds, the movement, as well as national and state associations. While most or all in-shed participants are men, almost all major media stories about men's sheds have been researched and reported by women. Women have been behind many shed startups and the procurement of funds, and some sheds have a female coordinator, whose key role is to know when to step forward (and back).

Some shed organisations and auspice bodies found calling it a Men's Shed too hard. For example the name 'Hocky's Shed' (opened in May 2002) in South Australia was chosen to ensure that the shed in Snowtown was open to both men and women and named after a local person. St Helens Community Shed on the rural Tasmanian northeast coast opened in 2003 and has always made women equally welcome in the Shed. Most sheds with such concerns have compromised by calling it a *Community Men's Shed*.

### *Gender and Men's Sheds Beyond Australia*

While the men's shed movements in the UK, Ireland and New Zealand are relatively young (where all sheds are post 2009), some trends are clear. Neil Bruce, who started one of the earliest men's sheds in Hamilton, New Zealand, recently said (pers. comm.) that:

... many women are some of the staunchest supporters of men's shed – not there to dominate or direct but to ably and tactically assist men in their communities to establish sheds through their skills and networks focussing on resource acquisition and facilitation.

Mike Jenn in the UK, who started the Camden Town Shed in London, one of the first in the UK, said (pers. comm.) that:

We open two days per week. .... One day is men only and the other mixed because we wanted to see if it made a difference. Few women have attended, on average about one a week. One who has attended most is skilled and says she likes 'the lack of fuss'. There is no real difference in the behaviour of the guys when a woman is present, though some things might not be said and one or two might be more ready to help a woman. We are all retired guys.

There is data from an Irish men's sheds survey in 2013 (Carragher, 2013) confirming that while nearly three-quarters of male participants (72%) reported feeling comfortable with women participating in men's sheds, in practice just seven per cent of sheds actually catered for both men and women (Carragher, 2013), and tended to do so separately. The Ennis Men's Shed, for example, recently celebrated the opening of the Ennis Women's Shed, announcing that 'the Women's Shed would be using the same facilities as the Ennis men's shed [but] at different days and times' (Clare Focus, 2014). So it seems that men's sheds in Ireland, as elsewhere, remain largely male gendered spaces. The discourse around the need for gendered spaces for some men has been couched in terms of getting the most out of learning together informally and improvements in wellbeing (Golding, 2011b). It is a sentiment that is echoed by John Evoy, CEO Irish Men's Sheds Association, when he describes men's sheds as 'places in the community where men who have time on their hands can come together, and use their skills, talents, energy and ideas to enrich their lives and local communities' (Evoy, 2013).

Carragher (2013) confirms that Irish men's sheds are places where men can support each other and talk, where lots of stories are told and lots of advice is offered, but in a casual and informal environment that breaks down the barriers that formal learning would create. They are particularly attractive to older men who are retired or have lost their jobs, need to 'get out of the house'. They enjoy doing 'men's work', fixing, building and repairing, with other men, not because they want to create a masculine environment, but because they enjoy working with other men (Carragher, 2013). As Wilkinson and Marmot (2003) argue, it takes more than good material conditions to foster health: it also takes friendships, feeling useful and having a sense of control over one's life. The critically important social determinants of health that Wilkinson and Marmot identify, unless addressed, make all adults, particularly isolated and older men, more prone to depression, anxiety and a sense of hopelessness. In 2008, the former president of Ireland, Mary McAleese called for more social activities geared towards older men in Ireland when she noted:

I often attend senior citizens' events and one of the things that would perplex me would be the vast number of women and the small number of men at these events. I would ask 'Where are all the men?' They are just not as good at social engagements as women. (McAleese, 2008)

McAleeses' observations are confirmed by evidence of the strong community networks forged by women, something which is in no small part attributable to the decades of struggle for equality, which can also be seen in other developed countries for much the same reasons. Organisations such as the Irish Countrywomen's Association (ICA) with a membership of over 11,000 women, along with other long-standing women's groups have been a source of education, support and friendship for women in Ireland for over a century. As in Australia, community education in Ireland was moulded from the 1970s by women largely around the needs of women as service users. Prior to 1980, few educational options were available for adult learners in Ireland other than night classes in vocational schools. With the emergence of locally-based, day-time Adult Education groups, many of the women's groups, whose management and service users were women, created new opportunities for learning (AONTAS, 2004). At the time, a key feature of these groups was the provision of childcare to learners, with many operating on a 'no crèche, no class' basis (Ibidem). When viewed from this perspective, it is easy to see why community education came to be perceived as "feminised", something which successive measures to attract more men have failed to address.

Today, men represent just 25 per cent of participants of community education programmes in Ireland (Community Education Facilitators' Association, 2014). Similar patterns have been observed elsewhere, for example in the UK and Australia for much the same reasons (Golding, Foley, & Brown, 2007), with men readily engaging in informal learning through men's sheds in ever greater numbers. Since the first men's shed opened in Ireland in late 2009, the shed numbers have grown steadily to over 100 in 2013, with a combined membership of around 2,500, and by October 2014 to 215 sheds open across the Island of Ireland (inclusive of Northern Ireland). Carragher (2013) found little enthusiasm among Irish men for learning in a formal adult education setting, with just 19 per cent reporting that they had attended a formal learning programme within the past year, and only one in three men were able to recall a positive educational experience at school. Within the shed they were actively involved in learning and in contributing to learning, sharing skills and experiences gained over a lifetime, and flourishing in the informal environment. The majority (97%) of men said that they wanted to access more learning opportunities, and for most (88%) it was important that this was kept within the shed because this helped them to learn (95%), provided them with opportunities to share skills and to mentor other men (84%).

Other evidence points to the positive effects that a therapeutic environment has on the body and mind (Fry, 1992; Silverstein, Hyde, et al., 2003). In Irish men's sheds, Carragher (2013) found that most men experienced a sense of belonging (95%), they felt valued and productive, fostering a healthy openness between them. For an overwhelming proportion of men, the shed was a place where men felt comfortable in accessing male health information (88%), where they could make good friends (99%), and give back to the community (97%), making them feel valued and productive. The majority reported feeling better about themselves (97%), more

confident (89%) and more healthy (95%). These important spill-over effects were not lost on the women their lives. Women are often the ones who make the first contact with men's sheds on behalf of their husbands or partners, encouraging them to take the first step to attend. As one man said:

Well I must say I look forward to it for a very social reason. For me it's great to come over, talk to people, discuss about nothing or something important. Number two, my wife is glad to see me out of the house but she's interested in what I'm doing too, but its conversation and she loves to see me in it. Number three, I love the joinery and all that.

Thus while women's role in men's sheds in Ireland initially appears insignificant, it is anything but and is a much under-researched area. Carragher (2013) found that nearly one quarter (23%) of men's sheds are managed by female coordinators. In addition, while participants' preferences for learning opportunities were first and foremost that another shed member with the appropriate skills would teach them, when an outside tutor is sought, there is no preference for male tutors. According to the coordinator for three men's sheds in county Louth (who happens to be a woman),

When we need to take a tutor in from outside, the men enjoy it when it's a women tutor. They loved the creative writing classes by the women [tutor] from Louth VEC<sup>4</sup> and the pottery classes, but they don't like it if a woman comes in from the community and offers to do a class. No, they don't like that at all. They say, "No, we can do that ourselves", but when it's organised through the VEC it's alright. I think they like the formal arrangement, you know, knowing there's a start and end date, that there's no danger of it drifting on.

#### SUMMARY AND CONCLUSIONS

Our conclusions in this Chapter are based mainly on research evidence from men's sheds where we are located in Australia (Golding) and Ireland (Carragher). Both our countries also have the most comprehensively developed national networks of men's sheds to 2014, established since 1999 and 2009 respectively, though separate men's shed movements also exist in the UK and New Zealand. We conclude that *some* men greatly benefit from and enjoy learning informally through community men's sheds wherever they have been established. These community places and spaces work very effectively as mainly or wholly male-gendered spaces, for men to gather, do and learn things together informally and 'hands on', interacting socially and giving back to the community. We conclude that it is men who are experiencing particular difficulties in their lives, families, communities and identities beyond paid work that are most attracted to, and benefit most from, of the gendered learning spaces now commonly referred to as men's sheds.

We also come to some new conclusions about the subtle but critically important role of women in the creation and support of men's sheds and the men who

participate, both as partners and professionals. This includes our acknowledgement of some important aspects of women's involvement in the invention of the first sheds in Australia for men in community settings from 1993, and the breakthrough of publicly naming it as a *Men's Shed* from late 1998. While men's sheds are in some ways a grassroots response by some men alienated to the feminisation of adult education and other community services during the 1970s, they have clearly been understood by and continue to be strongly supported and valued by many women.

## NOTES

- <sup>1</sup> Typically comprising men who are actively supportive of feminism and efforts to bring about gender equality.
- <sup>2</sup> Father's rights movement members are primarily interested in issues related to family law and child custody.
- <sup>3</sup> The mythopoetic men's movement aims to put men in touch with their 'true masculine' nature, including through rituals.
- <sup>4</sup> VEC: Vocational Education Committee, the local, statutory, education and training authority in the Republic of Ireland.

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*Barry Golding*  
*Faculty of Education and Arts*  
*Federation University*  
*Australia*

*Lucia Carragher*  
*Dundalk Institute of Technology*  
*Ireland*

**PART III**  
**(NON)FORMAL CONTEXTS OF**  
**INFORMAL LEARNING**





## 9. GENDER AND INTERGENERATIONAL PROGRAMS

### INTRODUCTION

This study is based on a socio-demographic analysis guided by gender perspective. It aims to understand whether the needs of the male and female population of the parish of Bonfim, a city of Porto in Portugal, are different. It also seeks to reflect on the role of informal learning as a vital means for promoting gender equality in intergenerational programs.

According to Newman and Sanchez (2007), the development of Intergenerational Programs (henceforth referred to as IPs) internationally can be divided into three phases. The first phase began in the late 1960's, in the U.S.A, in response to the geographical division between young and senior members of the families, which caused a decrease of the interaction and communication between members of different generations. The increasing isolation of seniors and the emerging perceptions, myths and erroneous stereotypes between generations also contributed to the isolation among them. In its second phase, IPs began to have different designs and broader purposes. Canada initiated the use of the IPs to address social problems concerning cultural, social and economic needs. That is, these programs became answers to problems affecting the most vulnerable populations, such as children, youth and elderly, who had difficulties with low self-esteem, drug and alcohol abuse, low school achievement, social and cultural isolation, lack of adequate support systems, unemployment and separation of their families, as well as separation of their culture and society.

This second phase lasted until the 1990s, during which time improvements of IPs as a tool for the community development led to the third and current phase. This third phase has involved evaluation of the emergence of these programs, mainly due to a worldwide increase in ageing including in Europe (European Communities Commission, 2006; Eurostat, 2010; Ramos, 2012).

Based on this brief description of the IP development story, it is possible to infer that IP is a recent construct, which has not achieved consensus in relation to its conceptual definition (Martinez, Kaplan & Saez, 2010). In effect, there is no general consensus about which concept of IP might be the most appropriate or complete, and which should be adopted. Our starting intention in this chapter is build or adapt

working definition of IP to insert into the real world context in which IPs will be developed – the parish of Bonfim. Thus, this study adopted the concept assumed by the International Consortium for Intergenerational Programs, which defines IP as ‘a practical approach in which all generations, irrespective of age, race, location and socioeconomic status, unites all generations in the process which is aimed to generate, promote and use ideas of knowledge, skills, attitudes and values interactively with the goal of personal and community improvements’ (Oduaran, 2002, cited by Hatton-Yeo, p. 19) –. We seek to add the words “irrespective of gender”, because we believe that the gender variable is extremely imperative, not only for the development of IPs, but also in all investigations and interventions which involve human beings.

The ways that men and women develop are generally seen to not only be under the influence of biological factors, but particularly by socio-cultural aspects. The established roles a priori assigned by the society, concerning how being a man and being a woman, and how women and men should act, are different. These roles are the source of construction of different gendered identities, different attitudes, behaviors and expectations, which has given rise to different and often unequal opportunities for women and men.

Women have faced most inequalities over the centuries. While this unfair situation has varied over time and between cultures, women have almost without exception been socially and culturally discriminated when compared to men. Women have been valued in almost all societies mainly as a consequence of their reproductive roles, in the domestic sphere and in the provision of care and other services for people. By contrast, men have been mainly valued for their performance in the professional and political sphere, which have conferred them a higher social status in terms of their social and economic power. Even in European democracies, women, to a greater or lesser extent, are faced with inequalities such as ‘double’ or ‘triple’ workday, greater burdens on household chores, lower wages, higher rates of poverty, unemployment, underemployment, less secure jobs, inaccessible jobs, lack of opportunities for accessing positions of power, more likelihood of being victims of domestic violence, with less opportunity for civic participation and greater risk of experiencing discrimination and structural inequalities in older age (Daniel, Simões & Monteiro, 2012; Amesberger & Haller, 2012; Motta, 2012).

The recent Gender Equality Index Report (EIGE, 2013a; 2013b), sought to measure the European level of gender equality after 50 years of available comparable data to 2010. The report revealed that Portugal is among the European countries with the lowest levels of gender equality. Its national rate of 41.3 compared unfavorably with the overall index of the European Union (EU 27) – 54.0. This empirically confirms that the needs and possibilities/opportunities for women and men in Portugal are different. Based on this data, it is vital, when planning, developing and implementing IPs to consider how gender and inequality, prejudice and discrimination have occurred and how it manifests in particular contexts.

In educational terms, IPs are included in the non-formal and informal learning spheres. Coombs and Ahmed (1974) define non-formal education as “any organized systematic, educational activity carried on outside from the formal system to provide selected types of learning to particular subgroups in the population, adults as well as children” (p. 8). The main purposes of IPs are to open windows of knowledge about the world around individuals and their social relationships as well as among different generations. In these programs there is an intentionality in action, in the act of participating, an intentionality in learning and in conveying and exchanging knowledge. Usually, the time which is devoted to careful programs planning is the biggest contributor to the success of the program. The development of IP programs necessitates an understanding of the needs and scope of problems which are to be faced, as well as the possibilities or action plans for constructing the desired objectives, which might include: the care of elderly and children, actions for strengthening educational systems, the enrichment of retired people’s lives, the development of a sense of belonging, the promotion of improved relations between grandparents and grandchildren, an increase in respect and protection of cultural traditions, a reduction of the isolation of older people, the promotion of sensitivity and concern for the environment, or improvement of community support systems, for example. Thus IPs are developed by the desire to meet the needs and aspirations of specific groups, such as that: people's participation should be optional and based around their interests and motivations, the planning of activities should be developed in collaboration with the participants, the rules ought to be defined in conjunction with the group, the role of educator should be shared among group members, as well as the role of technical guidance, support and monitoring.

The foundation of IPs is the interrelationships established between the participants. These interrelationships may be established in various ways, from person to person, from one person to several people, between one group of people and another, or amongst others. Thus IP programs generally follow elements of the following four models. First, senior adults serving children and youth (as tutors/as mentors/ as preceptors/the friends and/or the caregivers; second, children and young people serving senior people (i.e., visiting them, accompanying them or serving as tutors for some of the tasks performed by seniors); third, senior people working with children and young people to serve the community (i.e., development of environmental projects or in response to some specific social problems); and fourthly, senior participants and youth jointly commit to offer mutual services in informal activities, such as through learning, entertainment and leisure (Sanchez & Diaz, 2005). Regardless of its model or level of organization, people relate to each other with a common goal. In these relatedness emotions and feelings cannot be prearranged and they occur spontaneously in informal ways. As happens with emotions, much of the IP learning process is flexibly and informally constructed on spaces, sources and knowledge that Somtrakoll (2002) suggests as available in informal education activities such as through: a) Institutional Learning Centers: the learning activities provided by all types of libraries, museums, science and technology centers, community learning

centers, etc.; b) Cultural Learning Resources: all cultural learning resources, e.g., temples, parks, local wisdoms; c) Mass Media: informal education provided by mass media (e.g., radio, television, newspapers, books, etc.); d) Social activity: learning from families, friends and societies which are learning sources from birth for all people (p.35).

Coombs and Ahmed (1974) define informal education as “the lifelong process by which every person acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment – at home, at work, at play, from the example and the attitudes of the family and friends; from travel, reading newspapers and books or by listening to the radio or viewing films or television. Generally, informal education is unorganized and often unsystematic, yet it accounts for the bulk of any person’s total lifetime learning” (p. 8). It is the process of the individual’s socialization, in other words, the aim of the IPs.

It was described above that men and women assume distinct identities using attitudes, behaviors and different expectations. This evidence leads us to reflect on the possibility of uncritically disseminate gender inequalities in what concerns IPs, where the majority of the learning is flexible, informal and without any kind of technical supervision. Thus, from the beginning of the development of IPs there is the need to ensure gender equality. This issue will be presented in a later section titled “Discussion of the results”.

Returning to the aims of this chapter, we prepared a socio-demographic analysis of the parish of Bonfim, guided by gender. These information results from the first phase of the needs analysis of the above mentioned people which were integrated to the doctoral research project titled *Intergenerational Education as a Strategy for the Promotion of an Active Ageing: Needs Analysis of a local community as fundamental way of relevant and sustainable projects*, co-financed by the portuguese Foundation for Science and Technology (Fundação para a Ciência e Tecnologia – FCT). The information obtained in this phase will lead to the second and main analysis phase of the study, which involves direct collection of population data through interviews and questionnaires. In the last phase we expect to find the appropriate strategies to foster gender equality in the context of IP programs.

In order to characterize the population of Bonfim, an analysis was undertaken by gender of a range of socio demographic indicators, including population, economic activity, education, health and security.

### *Characterization of the Population of the Parish of Bonfim*

The parish of Bonfim flourished by Costa Cabral decree on December 15, 1841, during the reign of Maria II. Located in the city of Oporto, Bonfim is the fifth largest parish by total area and has a very high population density (7,837 inhabitants per km<sup>2</sup>; INE, Census 2011); it exceeds the population density of the city of Oporto, considered one of the cities with the largest population density in Europe (City Mayors Statistics, 2007).

One of the main problems experienced by this community is ageing. The parish of Bonfim has an ageing rate<sup>1</sup> much higher than the national average (268 and 129, respectively). As a result, the potential sustainability index<sup>2</sup> is also very low, at 2.3, and total dependency ratio<sup>3</sup> of the elderly (44) almost doubles the national average (29). This data alone justifies some form of social intervention by means of IP.

This serious aging process of the Bonfim's population has resulted in the "double aging" of the structure age: on the one hand, the decrease of people less than 14 years and the increase of people over 64, and, on the other hand, the demographic regression registered in the past decades in all age groups (Census, 2011).

These two phenomena are explained by several factors, among which the most significant are increases in life expectancy, a sharp decline in fertility and the forced departure of young people to the periphery, due to lack of access to housing supply in the inner city (Pimenta, 2001). This centrifugal population movement of Bonfim, similar to the movement within the city of Oporto, mainly in favor of the neighboring parishes and counties has reached especially young couples (Martins, 2008).

Of the 24,265 million inhabitants of the village of Bonfim, 13,541 million are female and 10,674 million are males: 56 per cent women and 44 per cent men. Considering the data by age groups, men are in a slight majority up to 24 years and from this age onwards the number of women is greater than the number of men and this difference increases with age (Figure 1).

The high proportion of women in the 65+ age group is most easily explained by the gendered differential in life expectancy between Portuguese women and men, of 82.43 and 76.47 years respectively in 2011 (INE). These data match the international findings which emphasize increasing feminization in older age (Ramos, 2005; Santana et al., 2012).

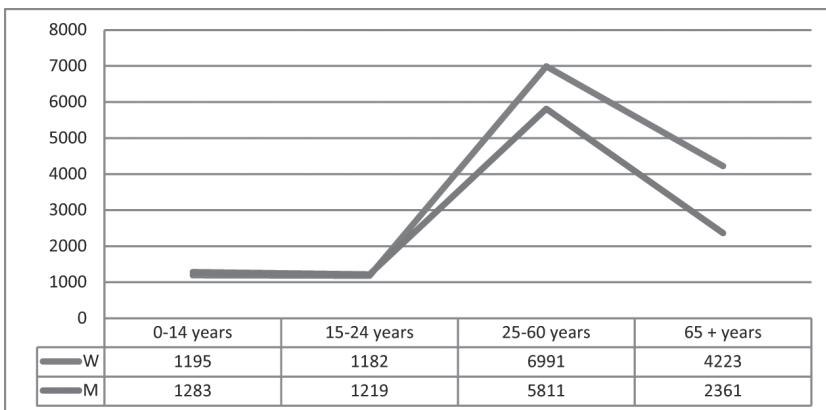


Figure 1. Population of the parish of Bonfim by sex and age group.

Among the initiatives to address this ageing population is the integration of immigrant people into these communities. In Bonfim, the representation of the foreign population is relatively low. In August 2012, according to the Foreigners and Border Service, only 224 immigrants lived with legal status in Bonfim, 55% were men and 45% were women. The predominant age group of both men and women immigrants was 25 to 49 years.

The origins of immigrant residents in the parish of Bonfim, by descending order, are from Europe, Africa, South America and Asia. Regarding European migration, both genders are equally represented. Men have mainly migrated from Africa and Asia and women came mainly from South America. The culture, mother language and religion are the conditions that most influence the routes and integration of Europeans into the autochthonous community.

Analyzing the religion of the immigrant residents, women came mainly from countries where the predominant religion is Christianity (Catholic and Orthodox) and men came in greater numbers from countries where the population is mainly Muslim, Hindu and Christian Orthodox. These data suggest that religion and culture of the country of origin influence the feminization of migration, that is, increasing the number of women who firstly migrate alone, and then later bring the rest of the family, aiming for family reunification.

Concerning the mother language, 41 per cent of immigrants came from Portuguese-speaking countries and 59 per cent came from foreign language countries.

The commonest marital status in the population is single (including children and young adolescents), followed by married people, widows and lastly divorced people. It is important to mention that 10 percent of single people have been living in consensual union and that men have more relationships (unions) than women after the divorce and after widowhood. According to INE data (Census, 2011), in Bonfim there are 10,994 classic families of which 1,566 are single-parent families. 88% per cent of these last families are headed by women contrasted with only 12% headed by men.

The number of elderly people who have been living alone in Portugal has been increasing. In Bonfim, in the last decade the percentage of people over 65 years old living alone has increased. In 1991 the rate was 9.71 per cent and in 2011 it raised to 16.22 per cent. The number of people over 65 living alone has increased 6.51 per cent over the past 20 years, while during the same period, the increasing rate at the national level was only 2.38 percent. These data suggest that the elderly living in Bonfim have been living in greater risk of isolation and loneliness, particularly women who are in majority in this age group, and are also the ones who are less likely to rebuild relations in cases of divorce and widowhood (Santana et al., 2012) as is common in other cultural contexts.

### *Characterization of the Economic Activity*

Currently the main economic activities in the parish of Bonfim are trade, banking institutions, small businesses and services.

According to the data provided by the general population census of 2011, the labour activity rate of Bonfim was 44% with 17% unemployed. This is a lower rate when compared to the national labour activity and unemployment rates (48% and 13%, respectively). It should be noted that Northern of Portugal has been the area most affected by the recent economic crisis that Portugal has been facing. When analyzed by gender, the female activity rate (40%) of the population of Bonfim is lower than for males (48%), while the male unemployment rate (19%) is higher for males than the female unemployment rate (17%). This is unusual and can be explained by the fact that at the beginning of the crisis male sectors have suffered a higher crisis impact. According to data provided by the Institute of Employment and Vocational Training (IEVT), in August 2012, women were in the majority among the people enrolled in the Job Centre.

This study also analyzed professional status in order to better understand the socio-economic situation. This analysis reveals that the most represented professional category is composed by experts, mainly intellectuals and scientific professionals. The second most represented category includes workers in personal services, protection/security and vendors. There is also a significant representation of technicians and professionals at the intermediary level (technicians from: sciences and engineering, health, finance, business, legal services, social, sporting, cultural technological and communication fields). The administrative staff has the same percentage as those who are representatives of legislative and executive sectors, officers, directors/managers and executives and those labeled as non-qualified workers.

An analysis of residents' occupations by gender revealed an horizontal segregation (gender segmentation) by profession: men who are from technical groups and professions at intermediate levels (representatives of legislative and executive sectors, officers, directors and executive officers; skilled workers in the construction industry, as well as craftsmen and operators of plant and machinery and assembly workers) are in the majority. Women are more represented in groups of experts from intellectual and scientific activities, workers in personal protective services, as well as security vendors, administrative staff and unskilled workers. This remaining indicator shows more precarious conditions of work for women, such as, informal contracts rather stable working, low income, often without social protection.

### *Characterization of Education*

This study reveals that the qualification levels of the population in Bonfim exhibits a more favorable structure when compared to the city of Oporto, and much better than the one existing in Portugal (Figure 2).

Concerning gender differences, the educational level attained by women lies at the extremes, i.e., they are those who have more studies (58% of the Bonfim population with a higher education degree) and simultaneously are those who have less education. Women represent 53% of people over 15 years who completed only



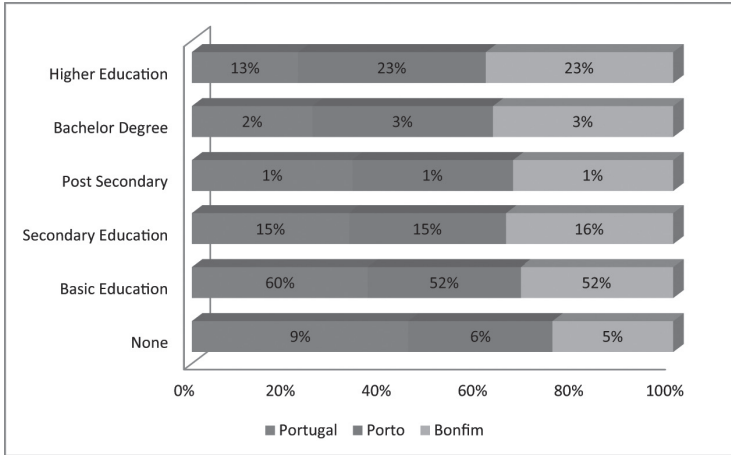


Figure 2. The highest completed level of education, by location of residence (%).

the first school cycle, while men represent 47%. The percentage of illiteracy amongst residents of Bonfim (2.76%) is relatively good when compared to the national rate (5.23%). However, it should be underlined, concerning gender inequalities, that many more illiterate people are women, 85%, and only 15% are men (INE, Census 2011).

Regarding school dropout rates, the data (1991–2011) reveal that Portugal has made significant progress since 1991 due to the rate being reduced from 12.6% to 1.6% in 2011. In the parish of Bonfim, the dropout rates were always below the national average, but in 2011 this trend was reversed, with a higher rate of 2.8% (INE, Census 2011). This finding may be related to North Portugal, because it is the territory more affected by the current economic crisis. Based on the data provided by the Ministry of Education and Science, it is evident that the for rates of retention and dropout during the school year 2010–2011, male students are more retained in all education cycles and drop out of school in a higher rate compared to females.

According to data provided by the same source, the number of people enrolled in adult education and qualification during the 2010–2011 school year, was high, and 55% of these persons were women and 45% were men.

Regarding the educational indicators, this study was also interested in identifying which were the areas in which the resident population achieved the higher qualifications. This analysis revealed the existence of gendered fields of study of residents who finished higher education. Women were in a clear majority in the following areas (presented in descending order): Teacher Qualifications, Educational Sciences, Humanistic Studies, Health, Arts, Social and Behavioral Sciences, Social Services, Life Sciences, Journalism and Information, Mathematics and Statistics, Physical Sciences, Law and Environmental Protection. Men were represented mainly in the following areas (presented in descending order): Engineering and Technical Studies, Architecture and Construction, Computer Science and Security Services.

In the remaining fields of study differences were practically nonexistent, such as in: Commerce and Administration; Industries Processing and Treatment, Personal Services, Agriculture, Forestry and Fisheries, Veterinary Science and Transport Services.

### *Characterization of Health*

Health is one of the main subjects associated with ageing, mainly because it affects the individual and also the wider population. Infant mortality in Portugal, has had achieved positive and exceptional results. It is the European country that most decreased the rates of child mortality over the past 50 years. In 1960, the country had an infant mortality rate of 77.5 per cent, reduced to 3.6 per cent in 2012 (PORDATA, 2013). Similarly, the number of deaths has been declining across the country.

The number of births has also been declining. The average age of women at the birth of a son or a daughter has been increasing, as evidenced the data in 2001 and 2011 provided by INE (2011). The data relating to adolescent mothers, registered at national level, improved in the past decade, with a reduction of the number of cases in 2001 by half in 2011. Concerning the age group of these mothers, 67 per cent were 18 years old and 33% were children or adolescents between 11 and 17 years old.

The data associated with health in the Census of 2011 provided evidence of a range of difficulties faced by the Bonfim population. These difficulties, presented in descending order, were: walking and climbing stairs; vision; memory and concentration; hearing; bathing and dressing; and also to understanding each other (Figure 3). Women as well as older people are the groups that experience more difficulties.

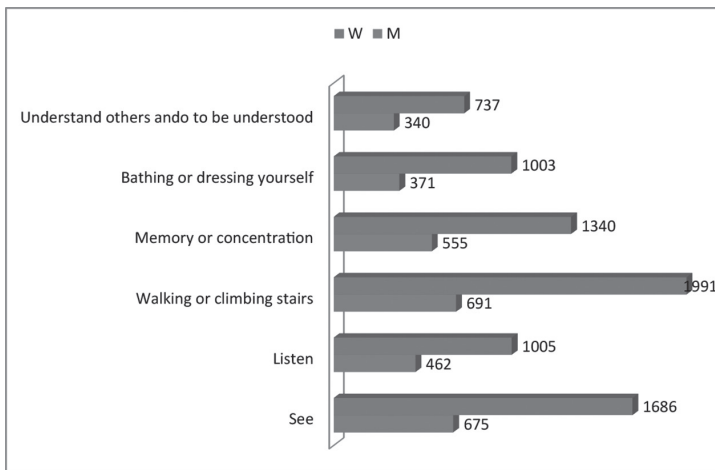


Figure 3. Health difficulties (N) in the parish of Bonfim categorized by type of difficulty.

### *Characterization of Security*

This study used registered indicators of crime to undertake an assessment of safety in the parish of Bonfim, as compared to the city of Oporto in 2012 (INE). In the last decade crimes against property (theft, embezzlement, fraud, extortion, etc.) have declined. However, the crimes against life in society (violation charges, breach of the duty of food, forgery, fire, etc.) and crimes against people have increased. This latter crime category is divided into four other subcategories: i) crimes against life or physical integrity; ii) crimes against personal freedom, iii) sexual crimes and iv) crimes against honor.

In an attempt to further analyze these findings, data were provided by the Portuguese Association for Victim Support (APAV, 2012). This data suggest that victims at the national level are mostly women (in all age groups) and the most victims are in the age groups between 25 and 54 years, followed by children and young people and, lastly, older people. The aggressors are mostly men, in the age groups between 36 and 50 years. The analyses by age group revealed that the aggressors of children and young people are mostly parents. Adult offenders are mostly the spouses or partners, and abusers of older people are mainly the sons and /or daughters. It is also noted that the most common location where the crimes are practiced in all age groups is the common residence, that is, in the family context. This finding suggests that at the same time, the family home is both an important area of protection and solidarity, but also an environment of violence and suffering (Ramos, 2005, 2012).

Now that the socio demographic analysis of the residents in the parish of Bonfim has been completed, the discussion of results will include the description of some measures to promote gender equality in the IPs.

## DISCUSSION OF RESULTS

The previous detailed characterization of the residents in the parish of Bonfim concerning sex and gender inequalities are briefly summarized below.

Women represent 64% of older people in the parish of Bonfim, and they live longer in a state of single, divorced and widowed. A very high proportion (88%) of one-parent families are headed by women. They are the ones who work in professions with less social status and visibility, are underrepresented in the professions with less power and, are those who have less income and economic power. Concerning the level of education, women have the lowest level of studies (representing 85% of illiterate persons, 53% of those who completed only the first cycle of basic education). At the same time, they represent the highest proportion (58%) of people with higher education. They represent the majority of victims of violence in all age groups. Women are the primary caregivers and educators of younger and older generations and the main protagonists and driving forces of familiar intergenerational solidarity.

Men represent 36% of older people in the studied parish; they faced fewer situations. of the single, divorced and widowed ones. They build more relationships in case of divorce and widowhood; corresponding to 12% of single parent families. They have occupations with higher social status and also are in most professions of power. They are the ones who have reached the highest income levels. Their level of education represents 15% of illiterate people and are less represented in the group of people with higher education. They are also those who are more retained at school and those with higher rates of drop out. They are the majority of the aggressors in cases of violence.

These results are not surprising, compared to the social and gender inequalities demonstrated by other national and international studies (CIG, 2011; EIGE, 2013a, 2013b). Inequalities are in part a result of the different roles of men and women. According to Eagly and Crowley (1986), men and women face different social expectations which tend to conform (to some extent) to stereotype gender roles reinforced by the social environment and, consequently develop different skills, attitudes, behaviors and beliefs. We can say also that they have different needs and potentials.

The IPs departs from the reality of people who are involved in the programs and simultaneously from the commonalities between them. Thus, if on the one hand in our analysis significant differences between men and woman were noticed, on the other hand we realized that both women and men have experienced many of the same problems. It is from this conjunction that we must leave when fostering gender equality. Some examples of appropriate strategies are the following: i) the creation of mixed gender groups (women and men) of any age group who face the same difficulties, ii) the identification and dissemination of the realities which contradict gender roles, for example in the parish studied, women are the majority concerning single parent families but there are also men that face the same situation. So, in developing an educational program to teach parents of newborns to take care the babies or the small children, it is possible to invite a man who headed a one parent family through his lifetime, to demonstrate and exemplify how to take care of the routines of infants and toddlers. This demonstrates that both women and men experience the same situation and that both have the capacity to overcome it; iii) the previous preparation of people that want to take part of these programs (Springate et al., 2010, p. 33). These sessions serve to prepare the participants not only for knowledge about the IP, but also what is expected of them concerning the program, and also to deconstruct stereotypes and prejudices between generations. According to Sánchez et al. (2010), guidance prepared a priori in working sessions carried out in each generational group separately, has produced good results. These consequences were achieved because participants had the opportunity to express their expectations about the program and also because they offered an opportunity for discussions of generational attitudes that each group has related to other participants who will work in the program. While allowing the group to reflect on the diversity of people, the demonstration of stereotypes, whether of age, ethnicity, gender, etc., do not represent

the whole reality. If the preparatory work mentioned above has not been performed, the probability of failure is higher and there is also the possibility of losing one of the most exciting opportunities of the experience, that is, the development and human solidarity, which is to discover, share and learn from the “other”. This previous work is also a way to reduce stereotyped attitudes between men and women concerning spontaneous experiences produced in IPs. iv) The materials used in these practices, such as books, newspapers, videos, films, etc., must be carefully chosen, respect gender equality and use neutral language, so that gender equality could be promoted through informal education.

## CONCLUSIONS

Like Portugal and other European countries, the parish of Bonfim has been facing a severe process of ageing. According to the projections for the future, this situation will worsen in the coming decades (INE, 2004; Commission of the European Communities, 2006; Eurostat, 2010). This prediction justifies the urgent need of political, educational and social intervention in finding solutions to social and health problems posed by an ageing population, bearing in mind the issues of social and gender inequalities.

IP programs bringing the generations together and fostering interactions reveal an enormous potential for the construction of the solutions to the problems we face in contemporary society, including gender inequalities. In this programs informal education has a distinguish role since the results of this type of education come from the development of common sense, often overshadowed by prejudices and gender stereotypes that guide the ways of thinking and acting spontaneously out of people.

It is essential to ensure that common sense becomes a sense based on acceptance, tolerance, understanding and respect for diversity. Towards reaching this goal, it is necessary to consider the gender issue from the beginning of the preparation of IPs, starting by analyzing what are the possibilities and opportunities that the future participants present so that specific strategies that promote gender equality could be developed.

## NOTES

- <sup>1</sup> Relationship between the elderly and young people, usually defined as the ratio between the number of people aged 65 years or more and the number of people aged 0 to 14 years (usually expressed per 100 ( $10^2$ ) people aged 0 to 14 years).
- <sup>2</sup> Relationship between the working-age population and the elderly population, usually defined as the ratio between the number of people aged between 15 and 64 years and the number of people aged 65 years or more (usually expressed per person ( $10^2$ ) with 65 or more years).
- <sup>3</sup> Relationship between the young and elderly population and the working age population, usually defined as the ratio between the number of people aged 0 to 14 years together with people aged 65 years or more and the number of people aged between 15 and 64 years (usually expressed by 100 ( $2^10$ ) people 15-64 years).

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*Susana Villas-Boas*  
*Faculty of Psychology and Sciences of Education*  
*University of Coimbra*  
*Portugal*

*Albertina L. Oliveira*  
*Faculty of Psychology and Sciences of Education*  
*University of Coimbra*  
*Portugal*

*Natália Ramos*  
*Open University of Lisbon*  
*Portugal*



## **10. (IN)FORMAL EDUCATION AS A SPACE FOR CREATING PERSONAL BELIEFS ON GENDER**

### INTRODUCTION

Acquiring knowledge, honing skills and attitudes on gender occurs during informal education during daily life. This is a learning project that we undertake for ourselves. Informal education defined as “the lifelong process by which every individual acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment – at home, at work, at play” (Coombs & Ahmed, 1974, p. 8), suggests that the environment we grow up in may be of key importance in our perception of gender issues. Generally, informal education is unorganized and often unsystematic: is not intentionally aimed to achieve educational goals, but it has educational effects. Home, family, work, play, media, people, places and self-experience are the educative forces negotiating with the individuals deliberately and reflexively (Qamar, 2012).

Experiences that we gain from family, local and peer environments during informal education pertain to our perception of the world and human nature. It is a characteristic feature of those individuals who have contact with a variety of environmental influences that result in day-to-day learning (Tudor, 2013). Informal education plays an important role in constructing gender assumptions. Everyone professes some views, and holds some assumptions that are a kind of colloquial theory of human behavior (including gender colloquial theory). In this case, the colloquial theory means that the beliefs and assumptions, which are present in our daily lives have an impact on our actions. Even if we are unaware of them, they help form our behavior, especially in interpersonal relationships. Literature on educating people working in the caring professions, e.g. social work, stresses the importance of understanding one’s theory of human behavior as the common convictions are being treated as “a filter of perception closest to behavior” (Lachowicz-Tabaczek, 2004).

The awareness of own beliefs and assumptions leads to a view that they have an impact on perception, attitude and behavior towards clients in social work. As Brammer (1984) said, the attitude of the supporting person is crucial for the positive development of the person assisted. Effective and ineffective helpers are not differentiated by the methods and techniques they apply at work but by their traits and personal beliefs.

Developing self-awareness also helps to maintain consistency between what we say and how we act as helpers. Knowledge of personal assumptions increases the



chances of helping others in meeting their needs, rather than implementing own theories. Finally, the way we understand personal theories of human behavior has an impact on how we interpret scientific theories, including whether we accept or reject them. The awareness of personal theories of human behavior develops interpretation skills and auto-creative competences of future social workers. Therefore, these theories should be familiar to students preparing for the role of social helpers.

#### COMMON CONCEPTS OF THE WORLD AND HUMAN NATURE

Knowledge on gender possessed by groups and individuals has a common, social dimension as well as an individual aspect due to unique personal experiences of a given person (Opozda, 2012). Naive knowledge characteristic to a researcher “from the street” has been of interest to scientists from many fields. Social psychology is one of the major contributors to the notion of common beliefs about the world, in particular the processes of attribution and formulating notions.

Common beliefs about reality are also known as naive theories, common concepts, hidden convictions, intuitive knowledge and common sense knowledge. Common knowledge constitutes judgments and convictions describing the static (pertaining to properties) or dynamic (pertaining to causes of phenomena) nature of convictions. Researchers of naive knowledge ascribe individuals different levels of awareness about tools used in cognitive process. Some claim people acquire knowledge involuntarily, others suggest that individuals are aware of cognitive processes and closely analyze the formulation of judgments and opinions.

Lachowicz-Tabaczek (2004) lists three methods of analyzing hidden convictions. The first method is indirect conclusion, namely observing the outcome of their actions, the second is asking questions about convictions and beliefs, and the third is experimental, involving a certain belief.

Understanding the concept of human behavior is crucial for anyone working with people, in particular for those who act as helpers (both professional and non professional). Okun (2002) states that understanding one’s personal theory of human behavior influences the interpretation of scientific theories, including their acceptance or rejection. Any human being has certain opinions and assumptions constituting the common theory of human behavior. In this particular case, common knowledge is understood as convictions and beliefs present in daily life and exerting impact on our behavior. Even if we are not fully aware of these beliefs, they still mould our behavior, particularly in interpersonal relationships. Numerous factors influence the formation of common beliefs, such as culture, upbringing, family, social and economic status, biological factors, gender, life experience, philosophy and people one interacts with. Among additional factors include personality traits, temperament and the level of self awareness.

The rationale behind learning about personal human behavior theory by helpers lies in the fact that once the assumptions are known, the helper is more capable

of aiding those assisted to meet their needs, rather than implementing their own theories.

Another example of a naive theory that might be applied by a helper is Brammer's (1984) personal theory of helpfulness. Formulating this theory it is worth considering certain philosophical issues, such as: 1) values and goals pertaining to one's opinions on 'good life', an example being an effective and mature person well functioning in society, conscious what they want from life and aware of their responsibilities towards others, 2) the essence of humanity, or to be more precise, the fabric that human personality is woven from the incentives to act, ways of thinking, correlation between thinking, feeling and valuation and the way choices are made, and 3) changes in behavior, including the way we learn.

The personal theory of helpfulness consists of three overlapping stages. In the first stage, the helper reflects upon their own experiences, becomes aware of own value systems, needs, communication styles and their influences on others. The second stage is devoted to compiling knowledge by perusing theories formulated and systematized by other practitioners. Finally, the two stages are fused into a personal, unique theory.

This theory is useful when it enables the description and explanation of what is being done to provide help and why it is being done. The theory is an intellectual tool facilitating systematizing and simplifying complex observations. The theory aids also in selection of the mode of work with the client whilst providing help. If the theory focuses on rational problem solving, rational methods will be employed while providing help. If the theory emphasizes the role of feelings, one will concentrate on classifying emotional states as the means of support.

Depending on social workers' experiences of gender, they will construct different categories of clients, assigning them specific characteristics and attributes of behavior, and as a result, different forms of help. A social worker must be constantly aware of differences resulting from gender, the problems of discrimination against women and men, and react to that injustice, especially while working with a family.

#### (IN)FORMAL EDUCATION FOR SOCIAL WORK

The ability to recognize common beliefs about the world and human nature is crucial for helpers and once thoroughly analyzed, these concepts may become the foundation of conscious and effective help. Therefore, students preparing to work as social workers should pay due attention to common convictions, including about gender issues. During classes on social work my students are often given an exercise helping to familiarize themselves with these concepts. The exercise is a kind of a platform where the knowledge obtained in informal education merges with formal education preparing them for social work. The meaning of informal education is that people's everyday lives might be used in formal education and therefore discussions they have had, things that they have experienced, barriers that they have overcome, *etc.* (La Roy & Woodcock, 2010). Both forms of education are important elements

in the total learning experience (Rogers, 2004). During the exercise questions about Personal Human Behavior Theory by Okun (2002) are used. The questions are divided into six categories:

1. Questions about possibility, methods and factors changing human behavior.
2. Questions about personality development and factors influencing the formation of personality.
3. Questions about ways and modes of learning.
4. Questions about the essence of being male and female, including causes of differences between sexes and races.
5. Questions about human nature, motivation to act, including controlling fate.
6. Questions about social deviation, its causes and definitions.

Students are asked to answer the questions and in small groups discuss particular elements of their theories. Information obtained is presented in a forum and compared with the theories formulated by other groups, resulting in an often lively, informative discussion. The exercise provides the students with a deeper insight into human nature and forces them to ponder other beliefs and points of view. Hypothetical situations are extrapolated to contact with the clients who, after all, may have completely different Personal Human Behavior Theories than the helpers. The exercise is also a very good opportunity to uncover stereotypes and prejudices often embedded in students' Personal Human Behavior Theories (particularly about gender) (Chrostowska & Ciczowska-Giedziun, 2011).

This article provides insights answers related solely to gender. The exercise was carried out by 1st and 3rd year B.A social work students. First year students worked in students groups of 24 third year students in groups of 26. The majority of students were women. In the first part of the exercise students answered questions about the essence of being male and female and the possible causes of differences between sexes. The other part of the exercise focused on how students' personal theories on gender, translated into ideas about how to help clients solve concrete problems. Results obtained were divided into semantic categories.

Students' answers fell into two broad categories. The first reflected stereotypical view about being male and female, ascribing men and women commonly accepted character traits, patterns of behavior and gender specific biological features. The following opinion was dominant among students.

Masculinity is foremost courage and strength, less susceptibility to stress, not being governed by emotions, as women are, [...]. Femininity is characterized by emotional way, susceptibility to stress, sensitivity and caring. (woman, age 20, I)

Being a man means providing for the family, coping in any crisis related to money or being able to fix things around the house [...]. Being a woman means nurturing family members, controlling the husband and the children. (woman, age 23, III)

The members of the second group perceived what is male and female outside of this stereotype. The blurring of boundaries between female and male roles was stressed, as was the fact that men and women complement each other. Typical reactions included:

To be manly means to be a man who is not afraid to show his feelings. (woman, age 20, I)

[...] nowadays women acquire features and skills that had been ascribed to men and vice versa. (man, age 23, I)

The boundaries between men and women are blurring. What used to be considered a uniquely male feature can now be exhibited by women and vice versa. (woman, age 23, III)

Nowadays male and female roles are blending. Both men and women may exhibit similar features. (woman, age 23, III)

The next question was about differences between the sexes. Answers fell into three broad groups. Many students pointed to biological causes, concentrating mostly on sexual and procreative aspects, such as:

Differences between sexes are due to biology as man was created to procreate, [...] prolong the existence of the society. (man, age 20, I).

Some answers pointed to differences in upbringing between boys and girls:

I think that differences between the sexes are due to upbringing. Since childhood we are told that a woman should be delicate and a man strong and decisive. (woman, age 23, III)

I guess the differences are due to upbringing. Parents dress their daughters in dresses and boys in pants. I wonder if any parent gave a boy a choice, such as "Would you like to wear a dress or pants?" the answer could surprise us. (woman, age 20, I)

Mostly students agreed that differences were due to biology and upbringing. As one student said:

[...] Both sexes have different sexual organs. But the way we behave is acquired during the process of socialization and upbringing. Since day one we are told that boys are strong, don't cry and play with cars, whereas girls are delicate, smart and play with dolls. (woman, age 20, I)

Students also attempted to the alternative scenarios of providing help to a mother of three children in the following situations: a) being the wife of an alcoholic, b) being abused by the husband. Depending on their experiences with gender identity and ability to ascribe meaning and values to gender issues, students came up with different categories of client behavior and thus different forms of help.

Examples of women applying for social help (e.g. as victims of domestic violence or being co-addicted) demonstrate that culture defined femininity internalized in the process of socialization and en-culturization emphasizes dependency, defensiveness, submissiveness, emotionality, external feeling of control and personal responsibility for failure (Klimczak-Ziółek, 2005). Women have been socialized to take responsibility for family relationships and the well-being of individual family members. Such approaches were particularly clear when answers were given about kinds of help that could be provided to a woman married to an alcoholic. Students tended to suggest types of help that enabled the woman to support her husband for the good of the family and to take responsibility. For example:

I advised her to think about the children and do anything possible to make her husband stop drinking [...]. (woman, age 20, I)

The client should do the utmost to get her husband to start the therapy. (woman, age 23, III)

[...] get him counseling, [...] try to save the family. (woman, age 23, III)

In cases of abused women, students most often suggested that she should leave the husband for her own and their children's benefit. For example:

I would advise the woman to leave the husband as quickly as possible. I would try to explain that she does not deserve such treatment, that she should change her life and remember that the children are witnessing the violence as well. (woman, age 20, I)

In summary, students conveyed a multifaceted perception of the essence of male and female and identified numerous sources of differences between the sexes as well as ways to help clients in difficulty. It is important that students are able to see the woman and her problems in the context of socialization and upbringing in order to better understand her situation (Sosnowska, 2010).

Beginning work with a family, a social worker should know what the gender perspective in the family means to him/her. Issues such as equal treatment, respect, partnership in family and the lack of dominance by one family member should be acknowledged and addressed. Questions such as what the modern family is, what does it mean to be a man or a woman nowadays or how gender perspective works in family life should be answered. Additionally, one could try to find out whether the family members are happy with their roles or are whether they are under pressure due to role division.

Collins, Jordan and Coleman (2010) provide recommendations for gender sensitive family social work:

- Focus on different interactions in the family (not just on the mother-child interactions). It is essential that problems of the child are not just a mother's

responsibility. Instead of this, it is imperative to involve both parents in changing family life.

- Gender issue should be understandable in the family. Social worker helps clients to negotiate the division of household duties and child care between both parents.
- Recognize power divisions in the family. One needs to be particularly sensitive to any violent behavior in the family. If violence is noticed, the social worker needs to undertake any action consistent with standard procedures in situations of violence.
- Look at the members of the family through the prism of their potential and opportunities, rather than as deficits and shortcomings.
- Realize that contemporary family structures take different forms and children have the capacity to function well in each of them.
- Despite all of the above, it is worth remembering that some families may prefer adhering to traditional roles. This preference may be based around religious or cultural beliefs. In working with these families, professionals should not impose different beliefs on them. However he/she must be sure that every family member is satisfied with the current role division, rather than having it forced on them by the most powerful family member.
- Encourage individual family members to take pride in their contributions to family life. Look for the positives and build on them.
- Go beyond stereotypes. Men as well as women can do the household duties, and the woman as well as man can work outside the home. Boys and girls should be involved for house-hold duties.
- Be sensitive to your personal biases concerning the perception of the roles of men and women. It is important to note that personal opinions are formulated on a basis of socialization. Social workers can even be unconscious of their gender biases.

Gender sensitive social workers help families recognize and change the destructive consequences of stereotypical roles and expectations within the family. They also strive to encourage egalitarian relationships within families. They empower family members and model benefits of sharing power. They encourage women to build positive self-esteem and encourage men to become actively involved in child and house hold duties. What is essential is that not only prevailing social attitudes and expectations – that frame gender roles – is important in social work with family, but also gender sensitive social workers recognize the influence of the economic, political and social environments in which people live (Ibidem).

## CONCLUSIONS

Informal and formal education are more valuable and useful if used in an integrated way. For this reason, informal and formal education about gender can be seen as complementary. What students have discovered, and actively worked on individually,

is likely to be incorporated into their attitudes, beliefs, opinions, emotions and might also be reflected in intentions and respectful behavior towards gender issues in their daily relations (La Roy & Woodcock, 2010).

Gender, similarly to motivation, empathy, values, ethics and language, influences the relationships between social workers and clients, as both parties bring into the relationship expectations linked to gender roles and sexuality. Depending on sexual schema, gender stereotypes and internalized concept of the sexes, different interpersonal (communication) and help strategies will be formed.

Getting ready to become a helper means obtaining knowledge on personality development, causes of human behavior, motivating people to act, cognitive processes, development processes and the influence of a group on an individual. Most of us have some thoughts on gender and aspects relating to it. Sometimes we are not fully aware of these thoughts and are not able to articulate them as clear opinions or theories. Nevertheless they do influence our behavior and attitudes in interpersonal relations (Klimczak-Ziółek, 2005).

Okun (2002) says that being aware of our beliefs enables the helper to realize that they influence his/her attitude towards the client. Moreover, Personal Human Behavior Theory analysis makes it possible for the helper to acknowledge how open they are to different opinions. Being more open means better elasticity and adaptability that often decides how many different people a helper can effectively work with and what diverse situations he/she will feel at ease in. While being familiar with theories and their applications is a key to effective daily work, each helper develops their own style of providing aid, consistent with their chosen theories.

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*Małgorzata Ciczowska-Giedziun  
Faculty of Social Sciences  
University of Warmia and Mazury  
Poland*





MARTINA ENDEPOHLS-ULPE, ELISABETH SANDER,  
GEORG GEBER AND CLAUDIA QUAISER-POHL

## 11. HOW THEY BECAME DIFFERENT

*Life Courses of Women Working Successfully in the Fields of Science,  
Technology, Engineering and Mathematics (STEM)*

### INTRODUCTION

One issue of concern with respect to gender differences in educational and occupational systems in almost all European societies is the frequently claimed horizontal segregation – the fact that women and girls are considerably underrepresented in science and technological education, fields and jobs (EURYDICE/EACEA, 2010). In spite of well documented observations regularly made by international surveys in recent decades that differences in the attainment of female and male students in mathematics and science are getting smaller (Bos et al., 2008; Klieme et al., 2010; see also Gila, 2001), girls and women still avoid the field of STEM (Science, Technology, Engineering and Mathematics).

Choices of school subjects and courses of study at university follow traditional gender stereotypes. Looking at all STEM subjects together, the percentages of young women choosing courses from this field are lower (for an overview, see Quaiser-Pohl, 2012). Physics and astronomy seem to be nearly completely male domains, whereas women are catching up in chemistry and mathematics (National Pact for Women in STEM, 2011, cf. Quaiser-Pohl, 2012). However, many female students in courses of mathematics and chemistry want to become teachers at secondary schools. The number of female students of engineering sciences and computer sciences remains very low, with few exceptions, e.g. computational visualization or information management.

This leads to a dramatic underrepresentation of women in these fields, as observed in several European countries (Eurydice/EACEA, 2010), especially in the northern and western parts of Europe. This underrepresentation is blamed, amongst other reasons as one cause of the vertical gender segregation within the labor market, the fact that the higher a position is in the hierarchies of institutions or enterprises the lower is the percentage of women in it, a phenomenon which is also labeled as the “glass ceiling effect”. This phenomenon prevents women from getting well-paid jobs with good career chances in a field with good prospects.

The situation has become focus of discussion in educational policy not only because it is a source of gender inequalities. Also, most European countries have difficulties providing a sufficient number of work staff in technical and scientific fields. In particular, a lack of qualified personnel is claimed in the field of engineering. Hence there is a great interest in encouraging both men and women to take up apprenticeships and study in the fields of STEM, especially in tertiary education.

Not least as a consequence of these concrete, economic interests, numerous scientific studies have been conducted in recent decades to search for approaches to an explanation as a basis for prevention and intervention. At the same time a multitude of changes, programmes and measures in the educational systems have been implemented to improve the situation. In spite of all formal pedagogical efforts, changes are not yet being realised (see also Ziegler, Schirner, Schimke, & Stöger, 2010), and female underrepresentation in STEM remains one of the most persistent and irritating problems of pedagogy (Ibidem.). Educational systems – regardless of differing ways to deal with the problem – have not been able to overcome the underlying mechanisms that lead to this underrepresentation (Endepohls-Ulpe, Ebach, Seiter, & Kaul, 2010).

Some theoretical approaches appear to be promising, focussing on the reasons for girls' and women's stereotypical choices of educational and career paths. All emphasize socialization experiences in informal learning processes as crucial for gender specific occupational choices (Overwien, 2007), which take place beyond the institutions of the educational system.

A well-known model to explain gender differences concerning occupational and educational choices was proposed by Eccles (1994). In this model, decisions for apprenticeships or careers are based on a complex network of variables. Some of the factors which Eccles and her colleagues identified as influencing achievement-related behaviour and occupational choices were: a person's expectations of success, his or her sense of personal efficacy, the subjective value attached to each option available, gender roles and other identity-related variables. Stereotypical views of certain professions which are dominant in a specific culture, as well as the gender-role stereotypes of parents or teachers influence each of these variables and also the subjective perception and evaluation of a profession.

The theory of Gottfredson (1981) can also be useful in explaining gender-specific career choices. In this model, career aspirations are closely connected with an individual's ideal self-concept. The choice of a certain occupation or educational path is seen as an attempt to integrate one's self-concept into social reality. According to Gottfredson, gender, social class, cognitive abilities, personal interests and values as well as innate or acquired personal skills are career-related components of the self-concept. Furthermore, career aspirations are continuously altered by adapting them to the individual perception of reality. Important environmental influences can include beliefs or concepts imparted by a father or mother, gender stereotypes in general and related stereotypical ideas about the particular professions in society as well as about the appropriateness of a certain profession to a person within a

particular social class. Thus, whether a vocation is taken into consideration at all, depends upon whether its attributes are subjectively perceived as compatible with components of an individual's self-concept, e.g. one's sex-role orientation or performance orientation.

Ziegler and colleagues (2010) suggest a systemic approach to explain the difficulties in order to change girls' gender-stereotypical achievement-related choices, especially in the field of STEM. Their model postulates an interplay of attributes of different social structures to maintain or reduce certain interests. These different social structures or spaces of action are called "actiotopes" and may counteract measures of pedagogical support by communicating contradictory attitudes or values. It is possible to apply the same model of interfering action domains or actiotopes to career decisions of adult women, who are often confronted with contradictory role requirements within family, employment or social networks.

With respect to social and psychological influences on adult women in their career paths, there are some theoretical approaches that can explain the reasons for female underrepresentation in STEM professions, in particular in higher positions. Sonnert and Holton (1995) differentiate between a "deficit model" and a "difference model". The "deficit model" postulates that women and men in the world of science and the world of work are treated differently. Studies which are based on this model explore the difficulties and barriers impeding women's careers. In contrast to this hypothesis of different influences in the form of barriers in the environment, the "difference model" assumes that women and men behave in a different way and have different priorities and aims regarding their careers. Accordingly, internal variables e.g. the gender-specific self-concept, become the focus of attention.

In view of the difficulties of formal pedagogical efforts to change the situation of girls and women in the fields of STEM and the obviously homogenous and high impact of gender stereotypes in most European countries, it seems promising to look at the specific experiences of women whose chosen career paths differ from the gender-stereotyped trends. Therefore in the two interview studies presented in the following subchapters, the life courses of women have been analysed who are successfully working in the STEM field. Analyses focus on socialization processes and processes of informal learning that have been crucial for the academic and occupational choices and the scientific careers of these women.

## INTERVIEWS WITH FEMALE SCIENTISTS IN VIENNA (STUDY 1)

### *Research Questions*

In this first study, women were interviewed who had graduated in a STEM subject and had then pursued their scientific career very successfully. All women worked either at one of the universities or at a research centre in Vienna. The two main research questions of the study were:

1. Is it possible to identify specific events and experiences in the biography of females who are successful in a professional STEM career at a university?
2. How did these women manage the stereotype: “Women should not work in male professions!”?

### *Method*

*Interviewees.* As the women interviewed should preferably be a homogenous group, 15 women were selected and interviewed who were writing or had written their first or second thesis in a STEM major. The youngest interviewee was 27 years old, the oldest 65. About one half of the women (7) were physicists: the vocational domains of the rest ranged from chemistry and biology to business informatics and plastics engineering. Three women were writing their first thesis, six women already had gained their doctorate, four of them were writing their second thesis and were working as a Post Doc, and one held a position in science administration. Six women who had already finished a second thesis were working as university teachers and researchers.

*Interview guidelines.* Firstly an interview schedule was developed, pertinent to the interviewees’ private and occupational situation, their family background, school and university experience and vocational career. Questions were also asked about people who had influenced the interviewees in their career decisions (including their major at university and professions). The interviewees were also asked whether they had experienced barriers or assistance regarding their vocational choices and what plans they had for the future (private and vocational). Finally, they were asked about their attitudes towards special intervention programmes that encouraged women to study a STEM major (Sander, 2012).

*Procedures and analysis.* The semistructured interviews were mostly conducted in a professional environment. Two women wished to be interviewed at home. The interviews were recorded, transcribed and analysed as described by Mayring (2012). The main steps of a qualitative content analysis, according to Mayring include summary, explication and structuring. It is the aim of a summary to reduce the information in a way that it will be manageable to the reader, while the explication should add new information necessary for a correct interpretation of the content. Finally “structuring” means filtering the material according to certain criteria.

The content analysis was performed by the programme MAXQDA. This programme enables the reader to quickly identify the originally transcribed statements which are analyzed and discussed. For instance, “Interviewee 3, passage 48 of the transcribed interview” is marked as: (3; 48).

## Results

The results of the study regarding the questions above were coded and structured according to the following criteria: experiences in early childhood, experiences at school and university, reasons for career choice, important characteristics of personality to manage the stereotype, support programmes for women in science and technology.

*Experiences in early childhood.* It is of interest that almost all the interviewees' fathers had taken a career in a STEM profession. Eight fathers were university graduates; seven of them had studied a STEM major. They mostly worked professionally as physicists, botanists or engineers, and one father was a doctor. Among the remaining seven fathers, six were craftsmen and only one had not taken a technical career. Most of the mothers were housewives or had been trained in a typical female profession, for instance as a dressmaker or office employee. Only four mothers were university graduates, working as a lawyer, a neurologist, and two were working as teachers of mathematics and physics at a Gymnasium (highest level of the Austrian secondary school system).

Most of the women said that their fathers had aroused their interest in mathematics, natural science and technology, but those interviewees whose mothers had an academic profession also mentioned that their mother had been an important model for their career choice.

For instance, one woman said that her parents were her most important attachment figures during her childhood (3; 48). Her father was an engine driver and was now working as a technical controller. She was convinced that her father had aroused her interest in mathematics, describing his attitude as follows: "He was always impressed if somebody was good in mathematics. And he convinced me that mathematics is something special" (3; 53).

One woman emphasized that her mother was her role model. She taught mathematics and physics at a Gymnasium and was the person who encouraged the interviewee to study physics (10; 60, 63-66, 77).

All of the women whose fathers were craftsmen said that their interest in technology originated from their father when they were helping him with technical activities. One interviewee said:

When I was a child I had not developed an interest in natural science. I was rather fascinated by the job of my father, he was a carpenter. This was totally fascinating for me. I wanted to become a carpenter too, and create something manually ... In his workshop I was allowed to try out something and to do with handicrafts ... This was amazing. (4; 26)

*Experiences at school and university.* No woman could remember any activities in kindergarten, which might have aroused an interest in technology or science. This

was also the case with primary school. No interviewee could name a teacher who had been active in this way.

However, the experiences at the Gymnasium and university were different. Six women stated explicitly that they had not experienced assistance with their interest in technology and science. However some positive experiences were also reported. One interviewee was in a girls' Gymnasium and recalled that she had 'fantastic female teachers' in all subjects (7; 70). Another woman remembered a very good female teacher in mathematics and physics (1; 22). One interviewee's interest in physics was supported by a young, engaging physics teacher (2; 44), and one interviewee felt particularly supported by a professor at the university (6; 121).

*Reasons for career choice.* The reasons for the career choice of the interviewed women were diverse, although most of them mentioned their interest in a particular field as the main reason for studying it. Some interviewees discovered their interest in mathematics very early at school but did not choose it as a major at university. For example one of the women (1; 57, 58) had finally chosen physics, because her sister was studying mathematics. Since her days at secondary school it was the dream of IP 3 (→IP = interview partner) to study mathematics and physics (3; 53). Finally, she chose physics as a major. IP 5 (105) wanted to study mathematics, but her parents thought it would be unprofitable. Therefore she decided to study computer science.

Two women had been fascinated by astronomy during their school days, but both parents did not allow them to choose an unprofitable field of study. Finally, they both decided to study physics combined with astronomy, writing their graduate thesis in physics (2; 44), (10; 75).

In some cases their career choices had no clear cause. Thus, one interviewee reported: "It was by mere chance that I began to study botany and zoology as a major" (7; 78). One day she met a lady at the opera of Vienna, who had undertaken her PhD in botany/zoology: "... this was probably rather decisive. There was somebody who was studying this major who did not want to become a teacher..." (7; 78, 88). Today she is a university professor of botany.

There were some women who did not choose their major primarily due to interest:

IP 11, for instance, reported that her choice of an engineer study programme was not due to her interest. As an immigrant from Croatia she came to Austria after the war. As she could get a grant for an engineering study programme, she decided to study forestry: "If I could have chosen freely, I would have studied psychology" (11; 60).

Answering the question as to whether she would choose this study programme again, she said:

Yes, I was very lucky. I would study the same programme again, but would try to be more conscious of my decision.... Now I know it is not important which subject one is studying, but it is important to make the most of it. (11; 94)

For IP13, the possibility to achieve financial independence and to get a good job were the main reasons for studying Industrial Engineering (13; 99–100).

*Important characteristics of personality.* The interviewees were asked which personality traits they would think of as necessary, in addition to a high competence in their chosen domain, in order to manage the well-known stereotype and to be successful in studying a technical or scientific major. The answers were broadly similar, but emphasising different characteristics:

Thus, some women mentioned that a tolerance of frustration was very important: ... maybe, it is the ability to handle a conflict like a game...or perhaps, it is a fighting spirit or the ability to offer resistance...yes, the technical term would be the tolerance of frustration.... (13; 218–221)

One interviewee thought it was important to accept competition and to resist typical female role models:

... not this typical behaviour of girls disliking competition...I think, it is very important to be able to resist influences of people who think you are unfeminine...When I was a young girl invited to a party, all the other girls wanted to study art and they were surprised: physics?, No.... (9; 158–161)

There were some women who thought management skills and ambition were important.

Finally, some interviewees mentioned an interest in technique and also networking is mentioned:

Inquisitiveness and love, love of structured thinking...Interest in how and why something works. Yes, if I switch on the light, how does this work? How are the laws of nature?. (5; 166–172)

... it is necessary to know the right people...to be only good in your domain is not enough. Often you get a job only through networks. This is very good but it is difficult to get into a network ... These networks are male, usually... if you are lucky, you meet people who know others and so on, then it is easier. (2; 95–97)

#### INTERVIEWS WITH FEMALE SCIENTISTS IN KOBLENZ (STUDY 2)

In the second study six female German scientists were interviewed using the same interview schedule and procedure as in Study 1.



The main research question in this study was: “What were the socialization influences that mainly promoted the occupational careers of the interviewees?”

### *Interviewees*

All of the interviewees pursued a scientific career and either worked at Koblenz University or at Koblenz University of Applied Sciences. The two youngest interviewees were 29 years old, the oldest was 39. All women (6) were employed in various fields ranging from biology to physics to computer sciences. Three of them had already gained their doctorate and the other three were writing their doctoral theses.

### *Data Analysis*

In addition to using the qualitative content analysis according to Mayring (2012) described above, the coded categories were summarized and analyzed quantitatively. The particular categories of interest were “Sozialisationsinstanzen” (‘instances of socialization’) as defined by Hurrelmann (2006). This includes “primary instances of socialization” (close personal relations, e.g. family), “secondary instances of socialization” (social institutions, e.g. school, university) as well as “tertiary instances of socialization” (wider personal relations, e.g. friends). A fourth category was included: “The career path and the development of occupational aspiration”, as postulated as part of the theory of circumscription and compromise by Gottfredson (1981). A fifth category considered was “gender and coping with gender stereotypes” according to the relationship between gender and socialization developed by Faulstich-Wieland (2008).

For each of these five categories and their subcategories, the number of mentions over all six interviews was counted and compared.

### *Results*

*“Primary instances of socialization”*. With a total of 26 mentions, primary instances of socialization were shown to be very important in the context of fostering occupational motivation of interviewees. Twelve of the mentions belonged to the subcategory ‘parents’ opinion about the daughter’s occupational career’, which seemed to be very important.

One interviewee described her parents’ attitudes towards her career in the STEM field as very positive and supportive: “They thought it was a fantastic idea and supported me from the beginning, i.e. financially and without reserve, that I was doing this now, and so on” (IP 2).

Another important subcategory with 6 mentions was an interest in technical and scientific issues from early childhood and continuously during their whole career, which had, however, not necessarily been evident for interviewees:

[...] for me mathematics and science have always been more easily understandable than language [...] i.e. it has always been more interesting and fascinating for me, but, honestly, I have never thought about this in my life. (IP 4)

Also very important, and frequently mentioned were the role models in the family (5 mentions):

And my elder sister who studied biology, too, took me along with her into the woods, then, and that was always very fascinating, [...] and because my sister, my elder sister had studied biology, I was absolutely determined to do that, too. (IP 1; 3)

Finally a parents' occupation seems to have significantly influenced their daughters' occupational choices. Half of the interviewees had a parent with an occupation in the STEM field, e.g. engineer or design draftsman.

*"Secondary instances of socialization"*. Experiences at school recorded 27 mentions suggesting a very substantial influence on the occupational choices of the interviewees, e.g. many of them reported to have been individually motivated by a teacher (14 mentions):

Especially encouraged ... I think I can remember – I may call it now 'Open Day', when people asked you rather early, of course: 'Wouldn't you like to take part and present something?'. (IP 2)

Sometimes they described the teacher's personality and his or her way of teaching and instructing as encouraging for the development of their own competencies:

And then I had a female teacher, who was, who conveyed her subject very well. She was my teacher in mathematics and physics, [...] and she did her job so well and taught her stuff so effectively, that I never had to learn anything else at home, besides doing my homework, I and got the best marks nevertheless [...]. (IP 4)

At school and at university, role models again have a crucial influence, mainly through teachers and professors (11 mentions): "When I was in Bonn later and studied biology, the professors whose lectures and seminars I attended influenced and shaped me very much, of course" (IP 1).

Positive experiences while working at the university, however, seem to be much less important (3 mentions). When they are mentioned, they are suggestive of enjoyment with scientific work:

[...] I then got to know the institute a little more closely and the people who worked in its groups; and I somehow liked being at the university. And I got to know scientific working there, and there were advertisements for doctoral positions on the walls [...]. (IP 1)

*“Tertiary instances of socialization”*. ‘Friends and other people in one’s environment’, with only 14 mentions, had the smallest impact on choosing the STEM field or a scientific career. The fact that interviewees shared their scientific interest with female peers seemed to support interviewees with a choice to study in the scientific domain:

[...] so if you choose chemistry or biology as your special subjects at school, you must have some special relation to those subjects. And there you could meet more girls than before, who had a soft spot for chemistry. (IP 2)

*“The career path and the development of occupational aspiration”*. Of the 23 mentions summarized in this category, 13 mentions dealt with an explicit comparison of possible career paths. For most of the interviewees, in addition to their interest in STEM, an informal event gave them the opportunity to pursue a scientific career, e.g. by having been offered a job:

I think it was one of these summer parties at the institute – you sit together in groups [...], you get into a conversation ‘Oh well, I could offer you a post-graduate position, are you interested?’, ‘Who are you by the way?’, ‘We could meet next week and I’ll introduce it to you’, and so on [...]. (IP 2)

The situation in a job market also influenced women’s career paths (8 mentions):

[...] there were, there are not so many vacancies; I applied for a job, unsuccessfully; and then I learnt that you can work for a doctor’s degree in the same group in which I had already worked for my diploma. (IP 1)

Salary, however, did not influence career choices, and was mentioned only twice.

*“Gender and coping with gender stereotypes”*. This last category, with 9 mentions was not very important in comparison to the other categories. A neutral or oppositional position towards traditional gender role stereotypes and non-traditional roles of behaviour seemed to have fostered their occupational career in the STEM field:

[...] I was a child who had always played outside very much – yes in the dirt and so on, but also very often maybe unusual for a girl, very often with Lego, yes .... (IP 3)

## DISCUSSION AND CONCLUSIONS

The results of both interview studies, when taken together, suggest three broad domains within the biographies of successful female scientists in the STEM field, in which one could say that processes of informal learning have influenced their scientific careers. First of all, the main reason for the choice of a STEM major was their profound interest in mathematics, physics or technical things. And this

interest was mainly awakened and fostered by their parents in early childhood, mostly by their fathers, sometimes also by their mothers and sisters, being scientists or craftsmen themselves was based around parental role model. The parents' or siblings' own fascination for mathematics or science, and providing of opportunities for technical activities encouraged the children's curiosity in nature and technical relations. Besides the crucial role of these primary instances of socialization, the secondary instances of socialization and formal education, e.g. by teachers, were much less important and had influenced the interviewees' interests only in some cases. This was similar to the instances of tertiary socialization with friends and peers. Thus, the sharing of an interest in STEM with female peers turned out to be one important aspect here.

Second, having reflected on their occupational choices consciously from time to time seems to be characteristic for successful scientific careers of women in the STEM field. Formal and informal networks, and offers of academic positions (doctoral or post-doc), often given by chance, however, play an important role in this context, too.

Third, with regard to gender stereotypes, interviewees were mostly convinced that it was necessary to consciously resist gender-stereotypical role behaviour, as well as not to accept typical female role models and developing a high frustration tolerance when doing so.

In conclusion, the role of primary socialization through parents and other important social partners (siblings, peers) for career choices and career success has often been underestimated compared to formal education. Thus, processes of informal learning should be taken into account in future programmes trying to motivate women to choose a major or an occupation within the STEM field. However, during later stages of their academic careers, women should be encouraged to take matters 'into their own hands' and not to hesitate when occupational and career opportunities are offered to them and not to waste them.

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*Martina Endepohls-Ulpe*  
*Institute of Psychology*  
*University of Koblenz-Landau*  
*Germany*

*Elisabeth Sander*  
*Institute of Psychology*  
*University of Koblenz-Landau*  
*Germany*

*Georg Geber*  
*Institute of Psychology*  
*University of Koblenz-Landau*  
*Germany*

*Claudia Quaiser-Pohl*  
*Institute of Psychology*  
*University of Koblenz-Landau*  
*Germany*

## 12. INFORMAL LEARNING IN THE WORKPLACE

### *Gender Differences*

#### INTRODUCTION

Informal learning accounts for over 75% of the learning taking place in organizations today. Often, the most valuable learning takes place serendipitously, by random chance. Most companies, however, focus only on formal learning programs, losing valuable opportunities and outcomes. To truly understand the learning in the organization we have to recognize the informal learning already taking place and put in practices to cultivate and capture more of what people learn. This includes strategies for improving learning opportunities for everyone and tactics for managing and sharing what people know.

Organizations today are seeking new ways to understand and deliver learning outside the classroom ... The reasons for this trend are many, but it is in large part fuelled by radical changes in the global market-place that have pushed many organizations to work, organize, think and learn in very different ways... Businesses that cannot respond quickly to customer needs and often find their markets overtaken by 'foreign' companies. The threat to the bottom line has forced businesses into re-evaluating time honoured ways of working... Businesses have turned to their human resources to help them survive and flourish. A key component of a new way of working with employees is continuous learning for continuous improvement .... (Watkins & Marsick, 1992, p. 287)

The most challenging question might be if it is possible or preferable at all to formalise the non-formal without losing the potential of the non-formal in itself. Non-formal learning does not necessarily contrast formal learning, but still non-formal learning has its main characteristics as something taken place alongside and opposing the formal, which gives it strength. If non-formal learning is put into schemes and curricula, then it is endangered of just becoming formal, with "no chance of escape". If the "non-formal" becomes "formal" it might turn into a new set of overwhelming demands socially and on the individual, feeling forced to comply. (Jensen, 2005)

### *Informal Learning*

In 1977, the OECD concluded that self-directed learning (the conscious part of informal learning) accounts for “approximately two thirds of the total learning efforts of adults” (OECD, 1977, p. 20). In the first Canadian, study on (conscious) informal learning, Livingstone (2000) found that 95% of all adult Canadians study informally for an average of 15 hours per week. Moreover, the survey confirmed informal learning as being relevant to many areas of life (e.g., work, volunteering, household, hobbies/areas of personal interest).

In job-related education, the “Berichtssystem Weiterbildung VII” (reporting system for advanced vocational training VII) (BMBF 1999) was found that almost three of four employees study informally to increase professional knowledge. Allen Tough rounds up with a slightly higher percentage (Tough, 1978). Staudt and Kriegesmann concluded from a poll that only 20% of all educational processes are covered by advanced vocational training (Staudt & Kriegesmann, 2002). Likewise, Sam Campell discovered in the Honeywell-Studies that 80% of all learning by managers results from professional experience and personal exchange with colleagues and employees (Zemke, 1985).

A study of informal learning, conducted in small to medium-size companies in the IT sector, was presented by Dehnbostel et al. (1999). In its quantitative section, 110 companies were polled providing a detailed description of on-site informal learning processes within the surveyed companies. Considering all learning activities, the focal point was communication processes such as continuous exchange about work tasks or professional challenges among colleagues. Deliberation resulting from this exchange between co-workers is at the focus of these learning strategies.

Most notably in our review and comparison of existing studies on informal learning is a plethora of considerably diverging definitions and terminologies. This diversity of perspectives is symptomatic for an examination of a multilayered phenomenon such as informal learning.

### DEFINITIONS AND DISCUSSIONS

The category of informal learning originated from terminology created by John Dewey. Later, reworked as “Informal Adult Education” by Knowles (1950), it was adopted by American adult education. Later Coombs and Ahmed defined informal learning as the lifelong process by which every individual acquires and accumulates knowledge, skills, attitudes and insights from daily experiences and exposure to the environment—at home, at work and at play: from the example and attitude of families and friends; from travel, reading newspapers and books; or by listening to the radio or viewing films or television. Generally informal education is unorganized, unsystematic and even unintentional at times, yet accounts for the great bulk of any person’s total lifetime learning—including that of a highly “schooled” person (1974). More recently, Marsick and Watkins have said that “informal

learning can be deliberately encouraged by an organization, or it can take place despite an environment not highly conducive to learning.” It is “usually intentional but not highly structured” (Marsick & Watkins, 1990, p. 12, quoted in Marsick & Watkins, 2001, p. 25). Rogers offers a broader definition of informal learning as “all that incidental learning, unstructured, unpurposeful but the most extensive and most important part of all the learning that all of us do every day of our lives” (Rogers, 2003, quoted in Rogers, 2004). Finally, Sousa and Quarter sum up such learning, saying that it is learning resulting from daily life activities relating to work, family or leisure. It’s not structured (in terms of learning objectives, learning time or learning support) and typically does not lead to certification. Informal learning may be intentional, but in most cases it is non-intentional (or incidental/random) (2003).

For its own discourse on education within the European Union, the European Commission has agreed on the following definition (European Commission, 2001):

#### *Formal Learning*

Learning or studying, usually happening in an educational or vocational context, which is organized and structured (in regard to goals of learning, time slots assigned to learning or learning support) and leads to a degree or certificate. For the student, formal learning is goal oriented.

#### *Non-Formal Learning*

Learning or studying, occurring in an institutional context (e.g., an educational or vocational institution), which does not result in formally recognized grades, degrees or certificates. Nevertheless, non-formal learning is methodic (in regard to goals of learning, duration of learning and learning instruments). For the student, non-formal learning is goal oriented.

#### *Informal Learning*

Learning or studying, happening in daily life, at work, within family life or on leisure time, which is not structured or organized (in regard to goals of learning, time slots assigned to learning or learning support) and usually does not lead to any kind of certificate. Informal learning may be goal oriented but in most cases happens unintentionally, coincidentally or at random.

In summary, the difference between formal/non-formal and informal learning may be specified accordingly:

On the one hand, informal learning means by-product learning, occurring along the way, considered neither the aim nor the effect of any action. On the other hand, the term encompasses all learning activities outside organized forms of education, undertaken with the deliberate goal of learning but facilitated in



informal settings. These processes of learning – unlike formal or non-formal learning – are arranged not by any kind of institution but by the individual learner. (BMBF, 2004, p. 146)

Given the fluidity in the definition of these terms, other authors advocate for the intersection of informal and formal studying as a continuum (Sommerlad & Stern, 1999).

Frequently, informal learning is part of organizational, professional or occupational contexts and serves to cope with tasks, requirements or facilitates in problem solving. In other words:

Informal learning is instrumental learning, a means to an end. Unlike formal learning, its goal is not information itself, but improving one's solution to an extracurricular task, a given requirement, or a problem of life by learning. (Dohmen, 2001, p. 19)

There exist different views as to what extent informal learning is not categorically focused on educational objectives and results. In contrast to the definition above, Dehnbostel and Uhe demarcate formal and informal learning distinctively – the latter focusing on practical objectives and purposes, not learning options (Dehnbostel & Uhe, 1999).

Further, the question of informal learning including subconscious routes to knowledge and subsequently, whether and how it may be delineated from generic cycles of socialization yields substantially divergent answers. Livingstone, for example, bases his studies on informal learning in Canada on an interpretation of the term closely aligned with self-directed learning and delineates everyday perception and common socialization by relating informal learning to a deliberate act of acquiring important knowledge (Livingstone, 1999).

An early and influential study on the subject in the context of work by Marsick and Watkins (2001) includes the attempt to develop a “Theory of Informal and Incidental Learning in Organizations”. The authors understand informal learning as umbrella term, including any conscious, deliberate, as well as subconscious and random learning efforts outside academic settings. They consequently outline the following terms:

- “Reflection without action”, theory-based studying without action is a feature of formal study.
- Generally, informal learning means contemplated studying efforts outside academic settings (“action with reflection”)
- Unintended learning in a non-academic setting is a special kind of informal learning (“action without reflection”)
- When an “absence of action and reflection” may be attested, “non-learning” is the result. That is to say: a behavioural change without a personal effort of studying may be attributed to indirect effects of socialization rather than to learning (Watkins & Marsick, 1992, p. 290).

## THE IMPORTANCE OF INFORMAL LEARNING AT WORK

Another major issue arising from the research in the field of informal learning relates to the importance of informal learning at work. Informal learning has been under recognised both in terms of reporting in statistics and its importance as a valid form of workplace learning. It is argued that both formal and informal learning are valuable to skill formation, and it is important to find the right balance between them. In a study of workplace trainers, Harris, Simons and Bone (2000) found informal workplace learning to be of central importance and, furthermore, that there was an inter-relationship between learning and work. That is to say, informal workplace learning is not merely an ad hoc process, but part of a deliberate strategy which takes into account the work which needs to be done and the skills needed to do the work. This may, for example, involve giving employees a variety of tasks, or arranging the work in a manner which maximises learning opportunities.

Informal workplace learning is of particular importance to small businesses. Various studies have found that, contrary to available statistics, there is a considerable amount of training taking place in small businesses, although it tends to be informal. For example, Smith et al. (2002) points out those small businesses are committed to training but lack the internal resources to undertake more formal approaches. Kearns (2002) points to the fact that small businesses rely to a large extent on informal learning as a way of achieving immediate business needs. He also argues that in the future more attention should be paid to developing formal approaches. Figgis et al. (2001) argue that formal and informal learning should be used together, with informal learning amplifying the value of formal learning.

While there is now considerable agreement that the workplace is an important site for learning some believe that the pendulum has swung too far in the direction of privileging “informal” learning (Rainbird, Munro & Holly, 2004) and that the potential benefits of employee learning through traditional knowledge and skill-based courses and qualifications have been downplayed (Pajo, Mallon & Ward, 2005).

In an effort to establish some measure of rapprochement amongst these diverse approaches to employee development, Fuller and Unwin (2004) proposed a heuristic that categorises workplace learning environments on a continuum ranging from restrictive to expansive. According to Fuller and Unwin, expansive learning environments are identifiable by such features as: employee participation in multiple communities of practice including those external to the workplace; a shared tradition of development within the primary community of practice; encouragement of diverse learning in terms of tasks, knowledge and location of the development experience; promotion of learning as a vehicle for employee career advancement and building organisational capability; organisational acknowledgement and support for employees as learners; employee development initiatives that provide opportunities for boundary crossing; a workforce where skills are broadly distributed; and a workplace where technical skills are valued and managers act as facilitators of

employee development. In contrast a restrictive learning environment is one where: participation in multiple communities of practice is limited; there is no shared tradition of development within the community of practice; learning opportunities are limited in terms of tasks, knowledge and location of the development experience; most learning is on-the-job with few chances for reflection; workplace learning is purely focussed on developing skills required for the employee's current job; there is little in the way of organisational acknowledgement or support for employees as learners.

Access and opportunity appear to be two key determinants in the ability of workplaces to provide positive learning experiences for their employees which bring benefits to the wider organisation.

### *Individual Responsibility for Learning*

The interaction between individual agency and organisational factors is a feature of the workplace learning models proposed by Billett (2002a; 2004) and Fuller and Unwin (2004). They suggest that the quality of learning at work is a product of both workplace affordances (Fuller and Unwin's expansive or restrictive learning environments) and individual engagement. Individual engagement is the process by which a participant chooses to take up the opportunities present in the workplace, a decision determined by a participant's values, knowledge, understandings and learning history. Learning at work is premised on the dual and reciprocal interaction of these two elements. As Billett (2002b) has observed "individual agency mediates engagement with activities and what is learned through participation" such that individual engagement is co-participative involving "an interaction between how the workplace affords participation and individuals engage in that social practice" (p. 29).

An emerging body of research on proactive individual behaviour in organisations (Crant, 2000; Frese & Fay, 2001; Parker, 2000) may assist in understanding the interplay of individual and organisational factors influencing learning and the development of capability for the workplace in developing a model of antecedents and consequences of proactive behaviour. Crant argues that there are two classes of proactive behaviour: 1) challenging the status quo, and 2) creating favourable conditions, that lead to improved job performance and career success. The antecedent of the individual behaviour is a combination of dispositional and situational factors.

In an attempt to understand these dispositional factors Frese and Fay (2001) argue that personal initiative and proactivity at work are linked to individual self-efficacy and self-esteem. In a work setting it has been found that self-esteem is impacted on by feedback from managers, job designs which convey trust in workers as competent people, as well as opportunities to experience success and recognition for it (Gardner & Pierce, 1998). Self-efficacy has been extensively researched in the employee development literature, particularly with regard to individual characteristics affecting motivation and participation. Self-efficacy has been strongly linked to motivation to learn, post-training self-efficacy and transfer.

*Contextual & Organizational Factors Shaping Informal Workplace Learning*

The workplace has always been considered an important setting in which adults learn (Dirkx, 1999; Matthews & Candy, 1999). However, interest in workplace learning has intensified in recent years (Billett, 2002; Collin, 2002; Ellstrom, 2001; Illeris, 2003; Stern & Sommerlad, 1999). Workplace learning can take many forms such as formal, institutionally sponsored learning including training and human resource development initiatives, as well as informal and incidental learning (Matthews, 1999; Watkins, 1995).

Research, however, has suggested that informal learning takes precedence over formal learning, and comprises the majority of learning that occurs in the workplace (Enos, Kehrhahn & Bell, 2003; Leslie, Aring & Brand, 1998; Lohman, 2000; Marsick & Watkins, 1997; Skule, 2004).

Although it is not a new phenomenon, informal workplace learning has attracted considerable attention in the literature (Skule, 2004). The trend toward employees assuming more significant roles in their own learning processes, the importance being placed upon learning as a core competency and lifelong process, and the recognition of learning as a source of sustainable competitive advantage for individuals and organizations alike has also stimulated tremendous interest in informal learning (London & Smither, 1999; Westbrook & Veale, 2001). Additionally, the growing focus on creating organizational environments that promote cultures, policies, and procedures conducive to fostering continuous learning has also influenced their importance of informal learning in the workplace (Dirkx, 1999; Senge, 1990; Marsick & Watkins, 1999).

It has been acknowledged that an organization provides an environment for learning that either facilitates or inhibits learning, yet few research studies have examined the extent to which the organization's environment serves to enhance learning (Knowles, 1984; Merriam & Caffarella, 1999). Watkins and Cervero (2000) have suggested that there is some evidence in the larger field of human resource development that a focus on the learning of individuals is less significant than a focus on the organization as a context for learning.

While the notion of context permeates the informal learning process, the interplay between informal learning and the context in which it occurs has been a largely unexamined area of inquiry (Cseh, 1999; Lohman, 2000) contextual factors that may shape employees' informal learning and their facilitation of others' learning is critical to advancing our understanding of how informal learning is facilitated, encouraged, supported and nurtured within the workplace. In particular, Skule (2004) has acknowledged that research on assessing and measuring the contextual and organizational factors that promote or impede informal learning at work is underdeveloped. Although the Marsick and Watkins model of informal and incidental learning that has been empirically tested in numerous studies that have focused on how individuals learn in organizations, they suggest that their model would be enhanced by additional studies.

*Informal Learning by Professionals*

However, there has been much less effort expended on determining how professionals in practice carry forward their learning and development beyond the initial qualifying period. Empirical research by Cheetham and Chivers was conducted in the late 1990s, involving a large number of professionals in England reporting on their informal learning following their entry into the relevant profession. Interviews with 80 professionals from 20 different professions, and a questionnaire survey of 372 professionals from six selected professions have revealed that English professionals learn by a whole variety of informal methods (Cheetham & Chivers, 2001).

The research has revealed that while these informal learning methods are well established and widely used, many individual professionals have pro-actively employed only a small number of them. More recent research by Eraut et al. (1997) into the development of knowledge and skills in the workplace should also be acknowledged. This latter study included some professional occupations, although it was not specifically focused on professions; but rather on higher level workers in three occupational fields; engineering, healthcare and business. Eraut's team conducted semi-structured interviews with managers, technicians and a number of professionals from each sector. This research again revealed that higher level workers, including professionals learn a great deal by informal (and incidental) methods at work (and even outside work), and do so in a wide variety of ways.

In considering the Eraut et al. list of learning episodes, it is also notable that learning by reflection on practice does not explicitly appear. Given that the study included professionals in the sample of interviewees, and given the generally very strong emphasis on Donald Schön's work on reflective practice when considering professional learning and development, this result may seem anomalous.

There is no doubt that Schön's research and publications have had a major impact on thinking and practice concerning the development of professionals in the USA, the UK and many other countries around the world (Schön, 1983: 1987). Indeed, for certain professions in England, such as teaching, nursing and social work, initial professional development programmes include much formal teaching and learning about reflective practice. Research concerned with professional development has until recent years largely focused on specific professions.

Gear et al. (1994) reported that up to the 1990s there seemed to have been a dearth of research which was cross-professional rather than profession-specific, and which had a significant focus on informal learning. Gear et al. (1994) themselves carried out an investigation across seven professions in regard to 'informal learning projects'. Informal learning methods involved included: reading, visits, meetings, practice, audit and conversations.

More recently Eraut et al. (1997) looked at the development of knowledge and skills in the workplace. This study included some professional occupations, but was not specifically focused on professions. The study involved semi-structured

interviews with managers, technicians and a number of professionals drawn from the engineering, healthcare and business sectors. These researchers identified nine broad types of learning episode, such as short courses, organised learning support, consultation and collaboration within the working group and the challenge of the work itself, and various factors that affected learning at work – confidence, how a person is managed, the micro-climate of organization, etc.

Poell et al. (2000) have gone further investigating how the diverse nature of work organisation influences the ways in which workers, including professionals, seek to gain knowledge. These researchers have studied, in considerable depth, how some groups of professionals organise themselves to learn from so called ‘learning projects’. However, the focus of the empirical research reported here has been on how professionals learn through their careers from an individual perspective.

There remains significant scope for considering the issue of the workplace as a venue and conduit for learning from the perspectives of both individual and organisation. There is still need for in-depth case study work, to ground further theory development in current workplace practices. Furthermore, studies are still required which look at individual learning in specific context, recognising that individuals will identify a range of structural conditions which may limit or facilitate their development (Huysman, 1999).

#### INFORMAL LEARNING AT WORK – GENDER DIFFERENCES

Research indicates that women lack access to informal learning activities such as mentoring, networking, and gaining experience through challenging assignments (Broadbridge, 2008; Vinnicombe & Singh, 2003). If up to 83 percent of workplace learning occurs informally or incidentally, as Marsick, Volpe, and Watkins (1990) claim, then women’s lack of access to these types of activities could impede their growth and development in the workplace. Women’s opportunities for informal learning may be limited due to their inability to gain entry into established male-dominated networks. Women continue to feel the negative impact of subtle gender discrimination. Both women and men acquire knowledge through interactions with others, as they build relationships and enter into meaningful dialogue. Gilligan (1993) states that women build identities through their relationships. Gaining access to key assignments through building important relationships leads to success in the workplace (Broadbridge, 2008).

Access becomes an issue of power, control, and knowledge which are often domains where people in minority groups are under represented by definition. It becomes important to understand the complexity of living systems and how to become integrated as part of the natural process. By answering the question of access, women can begin to understand the integration process and make decisions about how to proceed in becoming part of the natural system.

As women move into leadership positions, gendered spaces continue to be of particular interest since women, more likely than not, are surrounded by a masculine culture. This raises the question as to whether women are working toward a more neutral workplace or whether there is value in keeping a gendered environment for the women who make it through the glass ceiling. Schein (2004) supports the idea that culture is created by leadership. Since leadership positions are mainly held by men, they are primarily responsible for creating organizational culture. Schein argues “that the only thing of real importance that leaders do is to create and manage culture and that the unique talent of leaders is their ability to understand and work with culture” (p. 5).

## METHODOLOGY

### *Background and Aims*

The research in Bulgaria addressing informal learning at work, and especially gender differences, is limited by a lack of multi-layered methodologies and national surveys on skills, learning and training. Therefore, on the basis of a literature review and case studies described, we at the SM, NBU run a study of the informal learning at work in 2012–2013.

### *The Aims of the Study*

This study examined how women and men access informal learning and the effect of gendered roles on women’s participation in the workplace. This study specifically investigates how female and male practitioners make meaning out of their learning experiences within these organizations with different organizational cultures and leadership.

### *Design/Methodology/Approach*

A range of data collection methods were employed. Ten private companies were selected for the study and 120 managers and practitioners (60 women and 60 men) participated. Data sources included a structured and in depth questionnaire as well as interviews. The research asked about what happens to female and male managers that may be related to their learning experiences at work and the extent to which they are engaged in these activities.

*Research question 1:* To what extent and in what ways did females and males engage in informal learning activities at work?

*Research question 2:* What are the factors influencing their engagement in informal learning?

*Research question 3:* What characteristics of the organizational culture support the female and male informal learning at work?



## RESEARCH DESIGN, DATA COLLECTION, AND ANALYSIS

*Selection of the Companies, Participants and Demographic Profile*

A stratified, purposeful strategy was used to identify practitioners at different levels within the organizations representing different functional areas to provide a richer and broader understanding of how people engage in informal learning at work and the organizational factors that shape female and male informal learning and its facilitation within this organization. A total of 120 employees were chosen representing senior management level (12.4%), mid-supervisory level (16.5%) managers, and lower level employees (71%) from various functional areas (such as human resources, finance, quality and customer service, product development and design, process improvement, strategy, and manufacturing).

This study was conducted in 10 private companies in Bulgaria – small (25%), medium (42%) and large companies (33%) located in Sofia. The companies were from different sectors, including leading providers of insurance and bank products, building sector, water transport, consultancy, manufacture, telecommunications, TV, and automobile sector. The company management types were broadly as follows: 58% typical Bulgarian management and 42% – with a mixture of Bulgarian and foreign type of management.

All of the 120 employees invited to participate completed a questionnaire designed for the study. The participants included 60 (50%) women and 60 (50%) men, and their average age was thirty seven years. A majority (58%) of the participants had between 1 – 5 years of work experience with their current employer, 27% had six to ten years of work experience, 8% had 11 – 15 years, and 7% had between 16 – 20 years. Most participants (54%) had a bachelor's degree, 38% held a master's degree and only 8% held a college degree.

*Data Collection*

Some months prior to the study, the School of Management, New Bulgarian University (SM NBU), with the support of human resources professionals, and in some places with the support of managers employed by the companies, conducted focus group interviews with employees to investigate their perceptions about informal learning at work and how people engage in such activities. The use of these perceptions not only served as a data collection tool, they also provided opportunities to strengthen the data collected from the questionnaire.

*Procedures*

All data were collected using the survey. Using the sponsoring company's internal mailing system, the questionnaires were mailed to 120 employees. The practitioners were given a five week period to respond.



### *Empirical Research Methods*

The research conducted by SM NBU, which forms the substantial basis of this chapter, took the form of survey with 120 practitioners (60 women and 60 men) from 10 private companies.

Descriptive statistics (frequency counts, means, and standard deviations) were used to analyse the responses to the closed-ended items.

The themes that emerged relating to the informal learning at work and organizational factors shaping it from the dataset are presented following this brief overview of the research setting.

1. *Informal learning activities* – frequency of engagement – Survey respondents were invited to rate the frequency of eight types of informal learning activities such as “reflect on your previous knowledge and actions”, “interact with other people at work via email, social networks”, “learn from trial and error”, “talk with other people at work face to face”, etc. on a 1–7 point Likert scale (1 never, 2 seldom, 3 sometimes, 4 often, 5 usually, 6 almost always, 7 always).
2. *Personal factors*: This was a measure of participants’ perceptions of the degree to which personal factors like job satisfaction; interest in the professional field supports (influences) their informal learning at work. Perceptions were measured using a seven-point Likert scale (1 not at all, to 7 very much).
3. *Work environment factors*: This was a measure of participants’ perceptions of the degree to which the work environment factors – “relationships with colleagues”, “employee work environment”, “monetary rewards given for good performance” supports (influences) their informal learning at work. Perceptions were measured using a seven-point Likert scale as for 2 above.
4. *Organizational culture factors*. This was a measure of participants’ perceptions of the degree to which the organizational culture supports (influences) the informal learning at work. Perceptions were measured using a six-point Likert scale as for 1 above.

The cumulative scores for the four factors were calculated by adding the participants’ responses to each of the four suggested items.

## RESULTS

### *Informal Learning Activities*

As shown in Figure 1, the most frequently used informal learning activity was “reflecting on an employee’s own previous knowledge and actions”:

- 31.6% of men always engage in this type of activity, while
- 42.9% of women usually engage in this activity.

The second most frequently used activity was “learning from their own trial and error”:

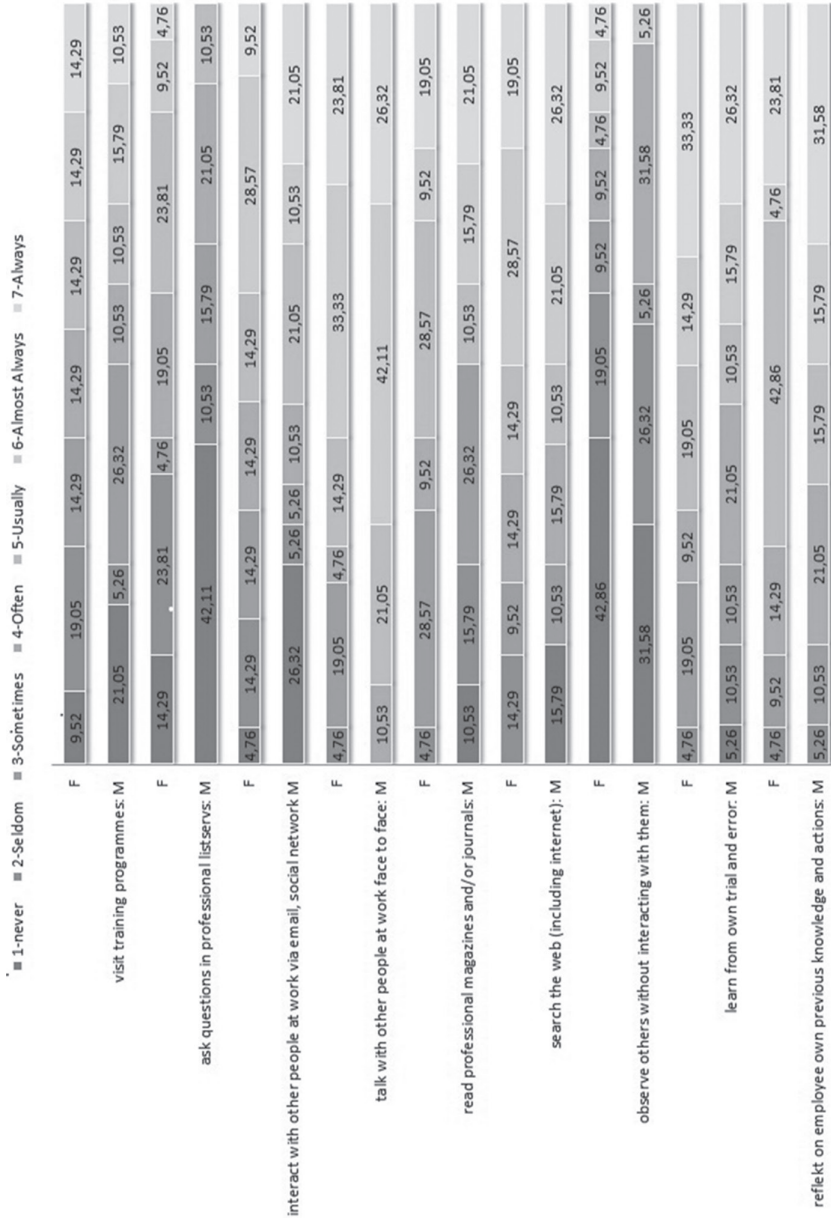


Figure 1. Informal learning activities.

- 33.3% of female – answer with “always”, 0.8% – “seldom” and 0% – “never”
- 26.3% of men – “always”, 10.5% – “seldom” and 5.3% – “never”.

The least frequently used informal learning activities were:

- “observing others without interacting with them”. Approximately thirty three per cent of the participants (Male 31.6%, Female 42.9%) indicated that they never engage in this informality at work.
- “interact with other people at work via social networks” – male 42.1% said “never”, while the percentage for the female was much smaller – 14.2%.

The study reveals that the women make assessments about the medium of the scale, while the men are more definite and extreme in their answers.

The Mean scores for the frequency with which the respondents use each of the eight informal learning activities ranged from a high from 3.0 (SD = 2.45) to a low of 1.71 (SD = 1.11).

### *Personal Factors Enhancing Motivation to Engage in Informal Learning*

Personal factors: was a measure of participants’ perceptions about the degree to which the personal factors like job satisfaction, interest in the professional field, self-evaluation of professional capabilities, the type of job itself and the personal style support (influence) their informal learning at work.

Figure 2 shows the extent to which each of the five personal factors enhances the employee engagement in their informal learning activities.

A ranking of the mean scores showed that two personal characteristics were most useful in enhancing the motivation of men to engage in the informal learning activities:

- “interest in the current professional field” (M = 4, SD =1.1), and
- job satisfaction (M = 3.5, SD =1.16).

“The interest in the current professional field”, was reported by 68, 42% of males (answering with “very much”).

“Job satisfaction” was cited by 48% of men answering again with “very much”.

For women – the most useful characteristic was “my personal style”, reported by 71, 43% of female respondents (with one third answering with “very much” – 33.3% or “much” – 38.1%).

### *Work Factors Influencing Informal Learning Engagement*

As shown in Figure 3, two work factors were found to be very important for the engagement of female professionals in informal learning activities:

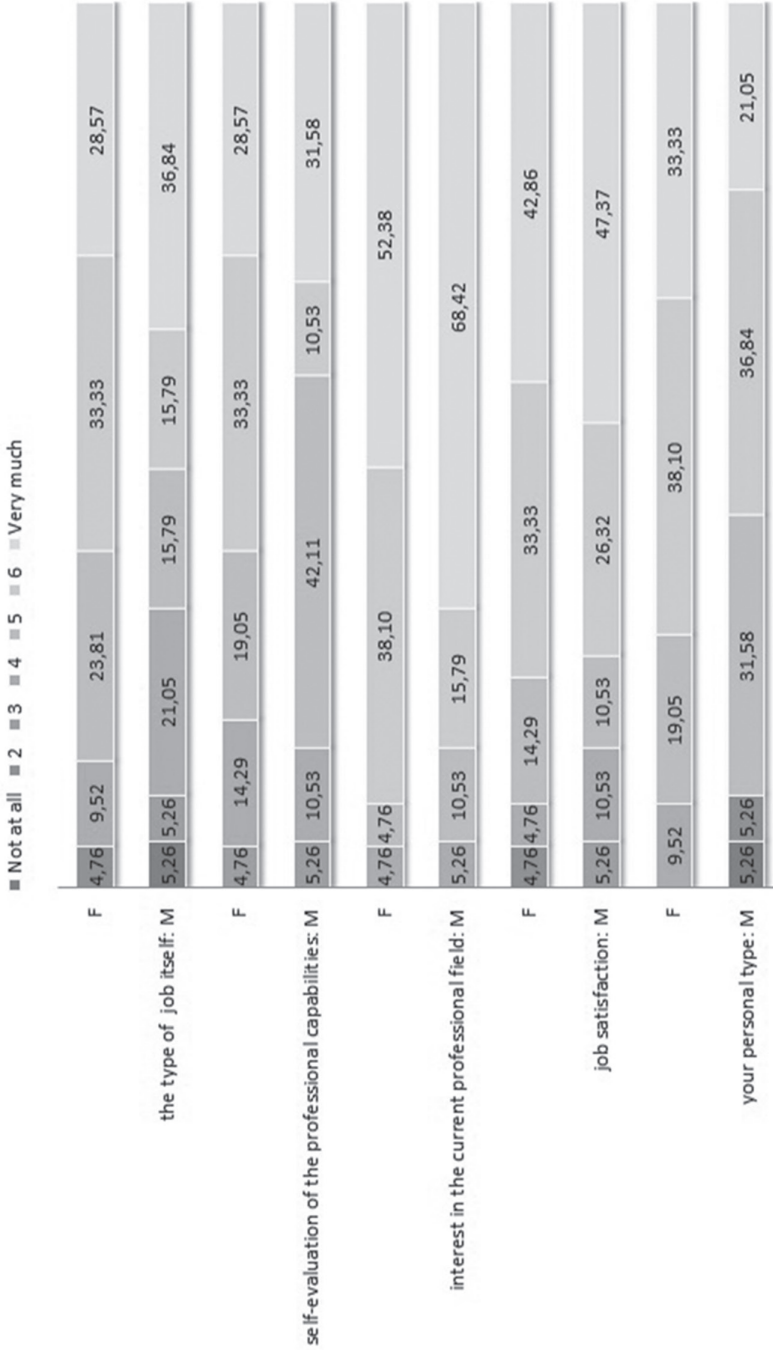


Figure 2. Personal factors.

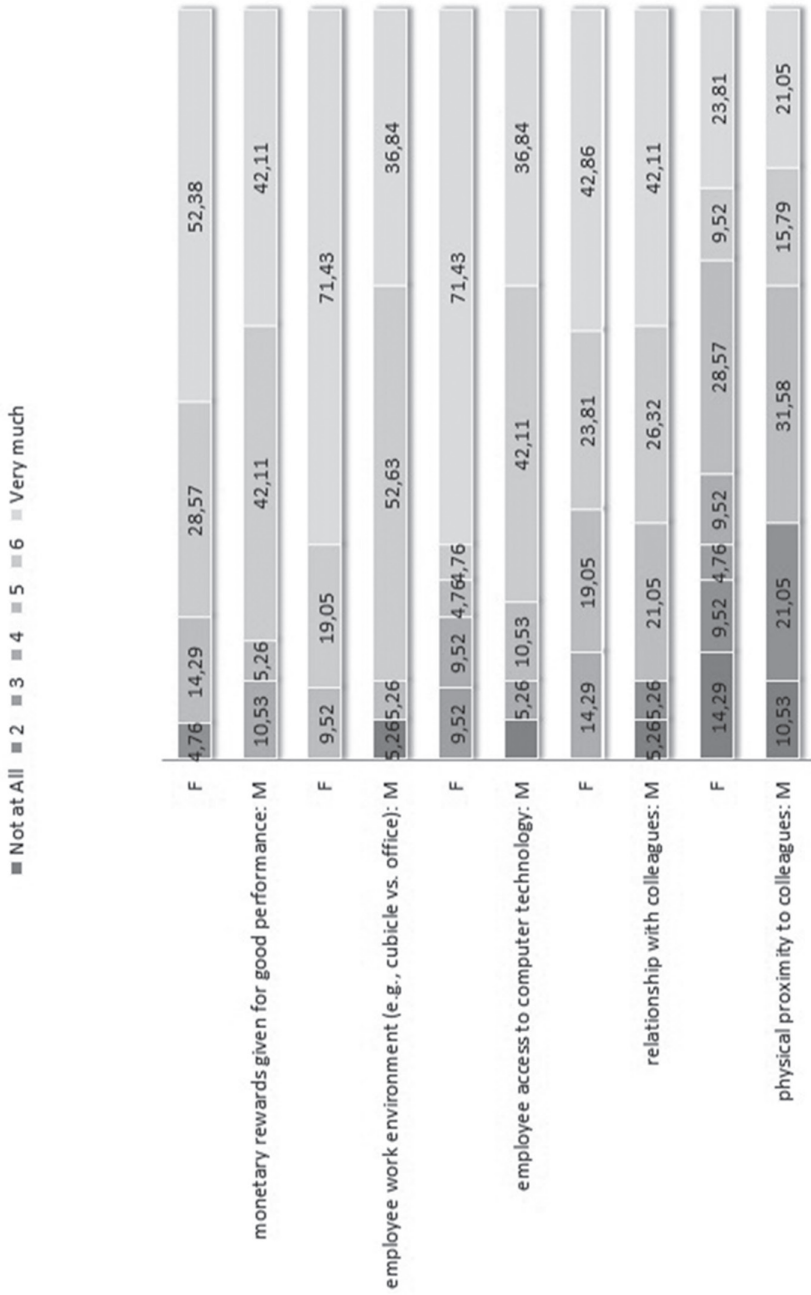


Figure 3. Work factors.

*Women*

- “the access to computer technology” (71.4% of female respondents answered “very much”) and
- “the work environment” (71.3% – answered “very much”).

*Men*

- “relationships with colleagues” – 42.1% answer with “very much”
- “monetary rewards given for good performance” – again 42.1% answered “very much”.

The least important factor was “physical proximity to colleagues”:

- 14.3% of women – gave the answer “not at all”.
- 10.5% of men answered “not at all”.

The mean scores for the factors from this group ranged from a high of  $M = 4.1$ ,  $SD = 1.6$  to a low of  $M = 1.4$ ,  $SD = 0.82$ .

*Organizational Cultural Factors*

This was a measure of participants’ perceptions of the degree to which the organizational culture supported (influenced) informal learning at work. Perceptions were measured using a six-point Likert scale: 1 almost never, 2 seldom, 3 sometimes, 4 often, 5 usually, and 6 almost always.

The questions about dependencies between organizational culture and conditions for informal learning are grouped in the following way:

*Group 1* – examines the impact of organizational culture directly on the individuals (women and men) taking into consideration all 13 factors from the 13 questions.

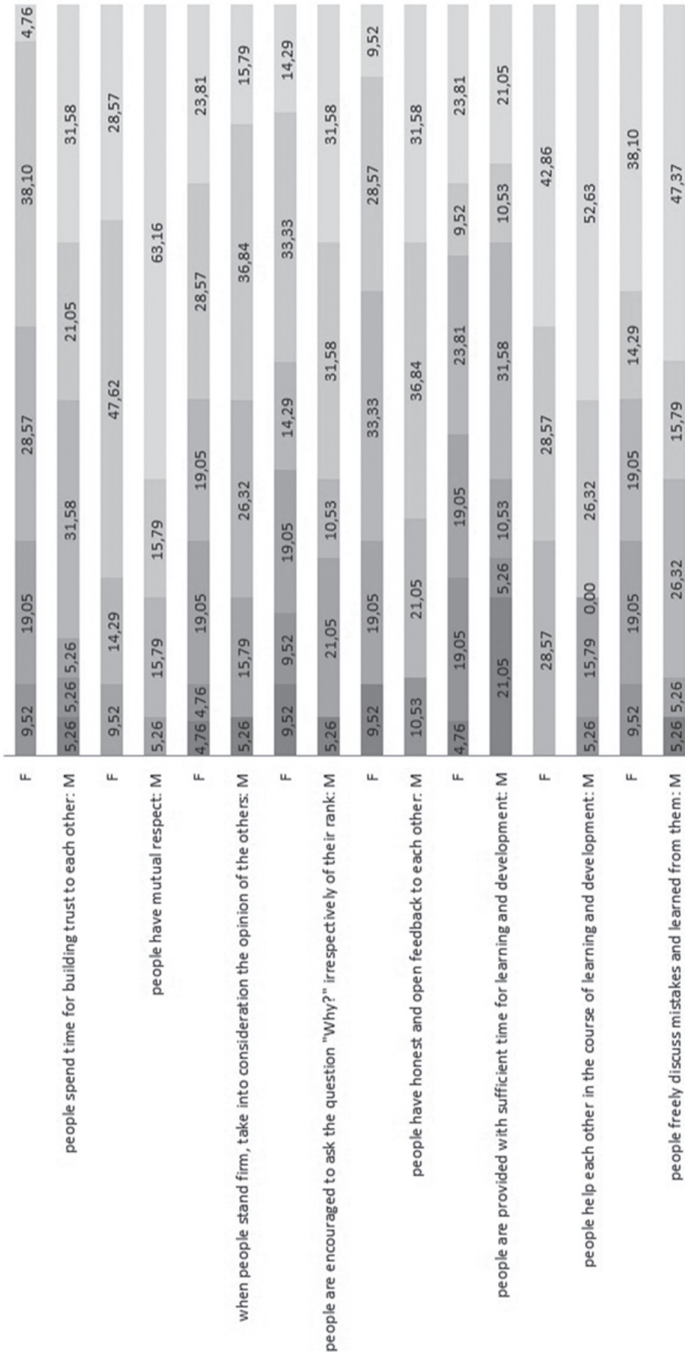
The data provided below outlines the key organizational (cultural) factors that influenced informal learning and describes the differences between men and women (Figure 4).

Generally, women tend to consider as key the following factors: “in my organization, people help each other in the course of learning and development”, and “in my organization, people are free to discuss mistakes and learn from them”.

The percentage ratio of female responses with “almost always” to these questions compared to all other 13 questions was relatively high:

- 42.9% responded with “almost always” to the first question, and
- 38.1% of them responded with “almost always” to the second question.

In general men perceived different factors as important to the organizational culture including: “in my organization, people have mutual respect for each other”, and “in my organization, people help each other in learning and development”. The percentage of male responses with “almost always” to these questions compared to all other 13 questions was quite high:



*1 almost never, 2 seldom, 3 sometimes, 4 often, 5 usually, and 6 almost always*  
 Figure 4. Organizational culture and personal.

- 63.1% of men responded with “almost always” to the first question, and
- 52.6% of men responded with “almost always” to the second question.

Concerning the factor “in my organization people help each other with learning and development”, the data is suggestive of its importance for both groups of respondents, though women perceived it as more important.

On the basis of female and male responses the following significant differences are highlighted:

It was more important for women than for men in relation to the following factors:

- “When people stand firm, ask others what they think about it” – 23.8% of female respondents gave an answer “almost always”, and only 4.8% – “almost never”, while only 15.8% of males gave an answer “almost always”, and 5.2% “almost never”.
- “In my organization people are given sufficient time for learning and development” – 23.8% of females responded with “almost always” and only 4.8% – “almost never”, while 21% of males responded with “almost always”, and 21% “almost never”.

By contrast the priority factor for men was as follows:

- “In my organization, people spend time to build sufficient trust to each other” – 31.6% of men responded with “almost always” and only 5.3% – “almost never”, while only 4.8% of women gave the answer “almost always” and 0% “almost never”, but much higher in the range “seldom” 9.5%.

Here the contrast between men’s and women’s opinions was greatest: 6:1. In none of the other issues were there a smaller number of female respondents answering with “almost never”.

The situation is similar with the following two factors describing the relationship between organizational culture and leadership: “in my organization people have honest and open feedback to each other”, and “in my organization people are encouraged to ask the question “Why” irrespectively of their rank”. All females answered to these two questions with “almost never” (with a very high percentage). 9.5% of the women were adamant that their organizations had never been honest and provided open feedback supporting informal learning in the workplace, on the contrary to the opinion of men, where the rate is 0%.

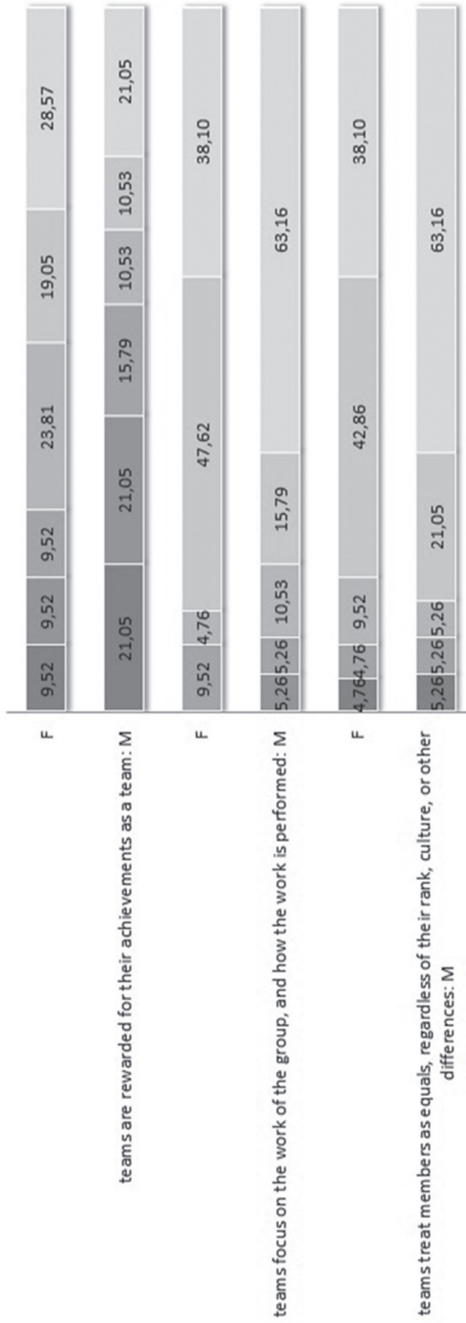
*Group 2* – explores the relationship between organizational culture and team work, taking into account six factors. (Respondents were asked to answer 6 questions).

From the responses given by men and women are highlighted the following significant differences (Figure 5):

More important and more influential for women than for men is the factor: “In my organization, groups / teams are rewarded for their achievements as a team/ group”.

- 28.6% of female give an answer „almost always” and only 9.5% – “almost never”, and 9.5% – “seldom”, while





*1 almost never; 2 seldom; 3 sometimes; 4 often; 5 usually; and 6 almost always*  
 Figure 5. Organizational culture and teams.

- 21.5% of male respond with “almost always” and a much higher percentage of them with “almost never” – 21% and 21% – “seldom”.

While the most significant factors for men are: „in my organization, groups/ teams treat members as equals, regardless of their rank, culture, or other differences”:

- 63.2% of men give an answer “almost always” and only 5.3% – “almost never”, while only
- 38.1% of women shared the view of men and respond with “almost always”, and 4.8 percent of them are adamant: “almost never”.

The second significant factor is: “in my organization, groups/ teams focus not only on the work of the group, but also on how the work is done” – just like in the previous benchmark, 63.2% of men give the highest rating – “almost always” and only 38.1% of women share the opinion of men and give an answer “almost always”.

The results show that despite the opinion of men for equality between men and women in the teams, the women are left with the feeling of inequality, regardless of their rank, culture, etc.

*Group 3* – examines the relationship between organizational culture and leadership, taking into consideration six factors. (Respondents were asked to answer 6 questions).

The data provided outline the following differences in the opinion between men and women (Figure 6).

Generally women tend to view as key the following factors: “leaders continually seek opportunities for learning and development” and “leaders ensure that the organization’s activities are corresponding with its values”.

The percentage ratio of female responses with “almost always” to these questions to all other 6 questions is high:

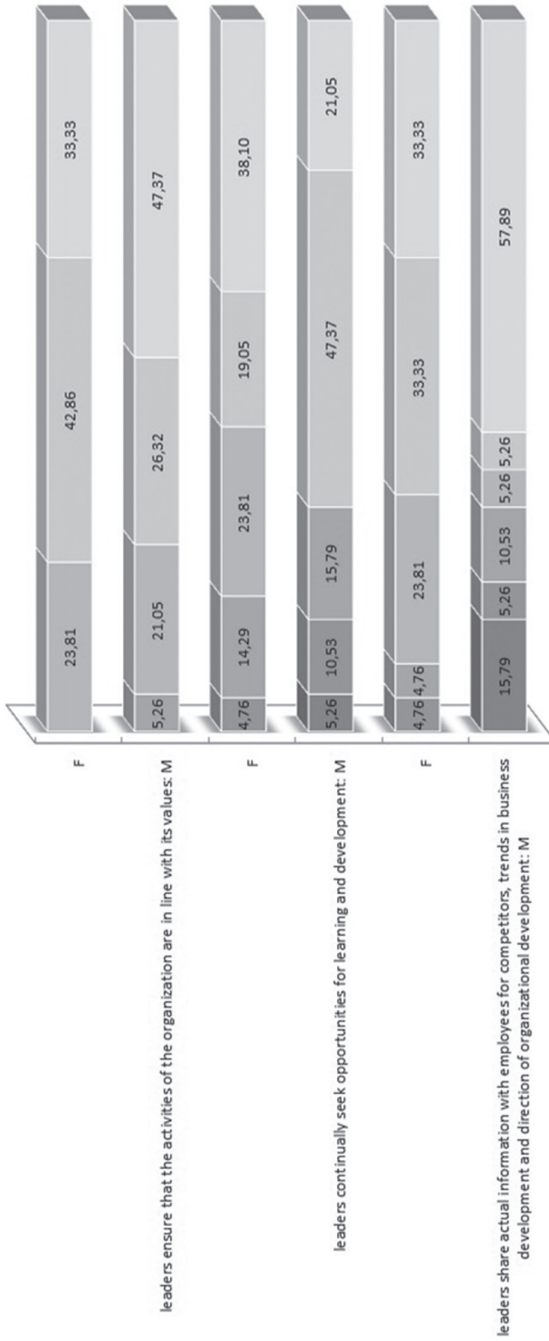
- 38.1% of women give an answer “almost always” on the first question, and
- 33.3% of them on the second question.

It is interesting, but no one woman give an answer “almost never” on both issues, and for the second question, the results show even 0% of women answering with “seldom”.

Unlike women, 5.3% of men believe that leaders never seek opportunities for learning and development.

Generally men consider as key the following factor: “leaders share actual information with employees for competitors, trends in business development and direction of organizational development”.

The percentage ratio of male responses with “almost always” to these questions to all other 6 questions is again high. Approximately over half of them (58%) give an answer “almost always”, while only one third of female (38.1%) responded with “almost always”.



*I almost never; 2 seldom, 3 sometimes, 4 often, 5 usually, and 6 almost always*

*Figure 6. Organizational culture and leaders.*

## CONCLUSIONS

The results from the study show that there is interplay of individual and organizational factors influencing learning in the workplace. There are also differences in perceptions about workplace learning between women and men. In terms of frequency of use of various informal activities, women most often seek opportunities to engage in social networking as well as learning from their own mistakes, while men are more likely to reflect on their own knowledge and experience.

As for the personal factors that stimulate motivation of the investigated practitioners to engage in informal activities – for females, a key factor is their personality; for male it is their professional interest in the work as well as job satisfaction.

*But does this mean that such types of individual engagement and proactivity at work are linked with individual self-esteem which is impacted by feedback from managers and job designs which convey trust in workers as competent people? The critical question is whether the organizational environment and culture enhances or inhibits learning of women and men?* The amount and quality of learning within an organization are heavily impacted by the context or the environment in which learning occurs. People learn about work through workplace culture, from the artefacts, shared meanings and interpretations of events, and from what is valued and rewarded. Culture shapes members' perceptions, behaviours, thoughts, and feelings about their environment, and informal learning contributes to the acquired knowledge needed to be successful at work.

Analysis of the data confirms that the culture of the organization (in sense of relationship between culture and the individuals; culture and teams; culture and leadership) affects how women gain access to learning and development opportunities. Women are more likely than men to perceive that their organizations don't provide or only partially create an environment (climate) which stimulates the honest feedback and "encourage people to ask the question "Why?", irrespectively of their rank" in order to stimulate their informal learning. Furthermore female respondents perceive that leaders don't share *actual information with employees for competitors, trends in business development and direction of organizational development*. The results also show that despite the stated opinions of men towards gender equality in their teams, women are left with a sense of inequality, regardless of their rank and culture.

The results from the study involve several limitations, and should be interpreted as general tendencies which need further, multi-layered investigation, including more qualitative analyses and case studies. The most important area for future research is to answer the question: "Do male-dominated cultures in organizations support the way women learn informally, do women adapt their informal learning to a masculine style, or there is some other more complex and interactive process at work"?

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*Elmira Bancheva*  
*School of Management*  
*New Bulgarian University*  
*Bulgaria*

*Maria Ivanova*  
*School of Management*  
*New Bulgarian University*  
*Bulgaria*

### 13. INFORMAL LEARNING AND GENDER

*A Revision for the Future*

In the process of socialization everybody notices a clear dichotomy of femininity – masculinity. On one hand, that dichotomy has adaptive role, because it helps to determine the place and roles in society. On the other hand, it becomes an obstacle in personal development and self-realization. Research shows that people who transgress stereotypical notions of gender roles have more development opportunities and successes in social roles in adulthood (Mandal, 2000; Bem, 1993). On one hand socializational mixed, contradictory, or undetermined messages create a wide range of choices. On the other hand, they create a sense of illusion that such a choice is possible at all. Whereas contradictory and unrealistic ideas can safely exist at the level of cultural role expectations, the attempt to implement them in reality will cause frustration and conflict. Finally, there are egalitarian messages, connected with the ideology of equal rights and equal opportunities. On one hand, they are accused of shaping the idea of emancipation from traditional patterns and gender roles according to the “male” canon of values and “masculine rules”. On the other hand, by promoting the idea of gender role exchange, going beyond typified gender roles or integration of features traditionally considered as masculine or feminine, they force people to redefine incessantly who we are as men and women, and to develop competences in understanding and using the potential of transgressing the traditional schema of gender identity.

All of those types of messages are noticeable in the sphere of everyday experiences and relationships, creating the elements of women’s and men’s life experiences in terms of gender roles. The concept of life experience is an important concept that can both initiate a learning process and can be a resource of educational activity. According to Illeris, each learning process is basically learning through experience (Illeris, 2002). In that process, apart from the characteristics of a learner and the external conditions of learning, a situational context plays an important role. The author defines educational experience as any event that leads to relatively permanent changes of motor, cognitive, emotional, motivational, and social competences, as well as in the sphere of attitudes. Those competences are connected with biological events concerning biological development, psychological ones associated with feelings, social ones related to interpersonal relations, and external ones related to the history of collective life. Depending on the context of learning, the experiences



may be included in biographical factors such as social origin, in contextual factors such as cultural capital, and interactive factors (Cocklin, 1996). These latter factors relate to relationships, interactions with significant people or gender experiences.

Adult education research should consider gender as a key focus to develop reliable and useful knowledge if the goal of this scientific field is to improve the quality of life of women and men, no matter what their cultural belonging, their school level, their social and professional status, their sexual orientation, or their religion, among many other possible individual affiliations. In fact, in the course of suffering discrimination, gender issues can be crossed with other social and/or individual categories – a process which is called intersectionality (Bradley, 2007) – and the person may be exposed to an incommensurable burden of prejudice, with completely unpredictable effects.

Also, the features of all kinds of informal learning, whether is it self-directed learning, incidental learning or socialization, following the typology of Schugurensky (2000; 2006), make us sure that even without the curriculum organization typical of formal education or the permanent supervision of a teacher that guides the acquisition of information, people can construct tacit knowledge, including the learning of negative gender messages and the silent incorporation of stereotypes. The contents of these learning experiences could interact with one's own characteristics (beliefs, values, attitudes) of each person, resulting in the formation of crystallized networks of knowledge about gender that are very personal and unique. Investigations related to issues of diversity lead to the need to take into consideration for both women and men.

Intersectional perspective, as different identities are experienced not in isolation from each other but as overlapping categories that combine to produce particular ways of being in the world. (Nogueira et al., 2010, p. 13)

Reinforcing this conviction, several studies conducted by behavioural geneticists have shown that the non-shared environment has a greater effect in the explanation of individual differences than the shared environment (Hoffman, 1991; Plomin, Asbury & Dunn, 2001). This could explain why, for example, two children born of the same sex and raised by the same parents could be very different, and give us arguments to affirm that tacit knowledge may have different 'configurations' and may have a distinct impact in each person's life depending on his/her individual characteristics, socialization patterns and daily contexts. That confirms the argument often formulated in the discourse of andragogy that shaping behaviours and attitudes is a process that occurs more efficiently in the environment of informal education (Kurantowicz & Nizińska, 2012).

Focusing gender issues and their influence on both men and women's life, research studies did so far have shown that

gendered structures and practices are quite persistent and resistant to change (...) [and] gender change projects tend to be difficult to sustain. (Heiskanen, 2008, pp. 123–124)

But if the possession of wrong information related to beliefs and values that should underlie behaviour in men and women may be a problem for implementing changes, the worst trouble is probably the individual's inability to think critically and to use such information in a reflexive way; to think of oneself as the creator of one's own life: planning, adapting to changes, initiative, decisiveness, flexibility and resistance to frustration. In fact, any intervention designed to counteract sexist stereotypes and other forms of discrimination should promote in each person, according to his/her cognitive abilities, critical reasoning and reflexive abilities that enable the individual to decide, to judge, to evaluate and to question the world around us. Much depends on the macrosocial context, including the state, which is still the mainstay of patriarchy (Castells, 1997). Hence, any attempt at eventual change will also entail the necessity to act against its instruments, and – indirectly – against society and its norms. Detachment from previously used practices sentences men and women to a daily social experiment (Giddens, 1992), which will incessantly cause new challenges and threats. That puts us in the face of a social trauma, which is a result of the conflict between tradition and biological determinants, and the right to self-definition as well as autonomous choice. The most effective factor soothing the sense of that trauma will probably be only generation changes (Sztompka, 2000).

The cognitive processes underlying gender stereotypes are very robust and extremely resistant to pieces of information that counteract what people have effectively learned (Santrock, 1998) because many things continue, unfortunately, to correspond to the ways interpersonal relations are organized in everyday life (Vieira, 2008; Saavedra et al., 2013), including family dynamics, educational institutions' environment and the functioning of social systems. So, the systematic presentation of information about how wrong the social organization could be in perpetuating unequal opportunities for both men and women based on gender order is not enough because:

Changes in gender roles, and the rising tensions that can surround the politics of gender, require reflexivity but also offer the change to enlarge the self-consciousness of learning subjects as well as the possibility of creating his/her own life according to individual needs, and not prescribed by dominant cultural norms. (Ostrouch & Ollagnier, 2008, p. 8)

The reality is constructed in everyday interactions, and the social life actors reproduce or undermine the existing rules, determine what is acceptable and give meanings to the roles. In order to elicit tacit knowledge and the deep meanings that people attribute to what they learn about themselves and the others around them, research on gender (and other possible sources of social inequalities) should go further in the analyses of pieces of reality (e.g., psychometric perspectives of knowledge construction in social sciences). It should use strategies that could respect their *emic perspectives* (first order language) (Silverman, 1993; Guba & Lincoln, 1994), which means their conceptual frameworks, their language, their clues and their idiosyncratic visions of their experiences, considering the individual in a holistic manner. More

than doing research *about* participants, researchers should develop projects *with* participants (Vieira, 1995), learning and sharing with them the power of conceiving and conducting the main routes of research in the field, avoiding irrelevant questions and the invasion of private and/or intimate domains of peoples' lives. Such a process of cooperation in using research strategies by both the external researchers and the internal participants could be crucial for the joint and democratic production of reliable knowledge that can be 'translated' to the scientific community according to an *etic perspective* (second order language) (Denzin & Lincoln, 1994) respecting the original meaning and language coding, and with no problems of traductibility and comparability (Goetz & LeCompte, 1984).

Considering that the possession (and control) of knowledge has been and continues to be a source of power (Tandon, 1981, p. 21), the scientific knowledge produced within gender issues could be seen as a way to empower both men and women who participate in such studies but also others in general, because the researcher has the responsibility to 'give voice' to scientific production of knowledge in order to use it to improve people's lives. So, giving voice to women's and men's ways of experiencing their common daily experience is certainly the right way to produce science that empowers people. According to Aldridge (2014)

this is especially important if such methods are to fulfill the principles and objectives of democracy and mutuality *and* if messages from these studies are to be transformative in broader social and political contexts. (p. 115)

Any researcher would like to hear in the final process of his/her research project some outpouring as Schugurensky (2006) did with his Brazilian participants:

because of my involvement with this process I am more aware of my citizen rights (...) this process gave me self-confidence. (p. 5)

Following the United Nations' recommendations disseminated in the document *Achieving gender equality, women's empowerment and strengthening development cooperation* (2010), it is important to "move away from the one-size notion" (p. 78). The 'one-size-fits all' approach in gender issues research and using positivistic methodologies could mean that certain categories of women but also certain categories of men are left marginalized. This problem is even worse if we consider the male bias in traditional social research, because:

Primarily, maleness is examined only when contracted to femaleness. The gendered lives of men are historically represented as generalizable societal experiences. In the hierarchical scheme of patriarchy, the social order of male supremacy and privilege depends on this accepted normalcy to remain invisible and unexamined. (Johnson-Bailey, 2005, p. 266)

Emphasizing this male bias and warning the scientific community of the mistakes than can be made when men are considered the pattern, Ollagnier (2008), alluding to the work of Belinky, Clinchy, Goldberger and Tarule (1986), referred that:

Women are often alienated in their formal situation as learners. They have learning needs, which are different from those of men and yet, in spite of the evidence provided, methods of assessment of training programmes make no allowances for specific sexual differences. The usual stereotypes about female emotions and intuition have, in their view, contributed to the undermining of women in academic disciplines, in methodologies and in theories conceived by men. (p. 22)

So, only when listening to the voices of both women and men and using critical approaches to build knowledge it is possible to understand their own characteristics and to take into account all their productive and reproductive roles as individual entities and also citizens, respecting at the same time “their ethnic identity and the value of traditional knowledge and practices” (UN, 2010, p. 78). Such an approach in social sciences emphasizes the proficiency and potentiality of the research participants (Aldridge, 2014) and is useful to overcome limitations of traditional tools of scientific methods.

Both in the field of feminist studies, which focus on idiosyncrasies of women’s experiences or in the field of gender studies, which tends to concentrate their centre of analyses in how both women’s and men’s learning are socially constructed and how both groups are related (Johnson-Bailey, 2005), critical research methodologies are the touchstone for change. In fact, listening through direct speech about the special needs and experiences of each individual is crucial to

promote the mainstreaming of a gender perspective in the design, implementation, monitoring and evaluation of national policies and programmes in all political, economic and social spheres to ensure that the needs and priorities of women and girls, and men and boys, are taken into account. (UN, 2010, p. 261)

Of course, the insider/outsider dilemmas experienced by the researcher are compelling because he or she may have been in similar situations or may have suffered equivalent discriminations (Obasi, 2014), being a man or a woman. But such problems can be seen as a kind of a ‘countertransference process’ (Holmes, 2014), which has a very rich potential to foster the intersubjectivity between the participant and the researcher helping to develop credible scientific knowledge. It is possible through the acceptance of a “naturalistic approach to the world” (Denzin & Lincoln, 2005), relating to the postulate of conducting research in environment in which daily experiences normally happen, trying to give the meanings, or to interpret different phenomena with the use of terms that are used by interviewees. To those preferences we can add focusing on the whole experience, searching for meanings and essence of experience, formulating questions that reflect the experience, and treating experience and behaviour as a merged relation of a subject and an object.

The emancipation of knowledge and learning from the framework of institutional education has enabled researchers to focus on those learning areas that were previously unobtainable, because of both theoretical and methodological reasons.

Andragogists reached cognitive autonomy allowing them to explore the process of learning (Gutowska, 2013) as a lifelong process, both relational and poli-contextual (Edwards, 2006), including informal learning. With regard to gender identity and roles, researching private worlds – worlds of informal learning could highlight the process of ‘doing gender’ (West & Zimmerman, 1987), in order to better understand how adult women and men develop their relationships and biographies in the contemporary world.

This book, as a contribution to that field, discloses many more areas of women’s and men’s lives still waiting to be explored through the lens of gender in social science. Such a research could also be very useful for educational practice, giving a base to transgress different forms of social inequalities and discrimination. Inequalities that are not a result of gender differences, but the organization of institutions and social life, in which “masculine” features and values are positively valued and rewarded. The following are only a few examples of some intriguing questions still worth analysing from gendered perspective, which have also arisen in some chapters of this book: how men and women experience their intimacy; how they develop their competencies of taking care of others (elders, infants, people with disabilities) at home; how women experience and overcome the family – career dilemma when they enter professional life; what kind of effects are being experienced by men who do not conform to values of hegemonic masculinity? For the aforementioned reasons traditional methods of research could not give adequate answers to such complex questions and the challenges for gender-sensitive researchers have not decreased over the last years. The context of this book is a successful part of the collection of many other projects waiting to be carried out in very different fields of science.

The contemporary world will increasingly require people to be members of an open, plural, multicultural, personalized and egalitarian community. Education should prepare people for such a world, because these are the basic requirements of democracy and social justice. The results of research into “private worlds” of women and men can support those processes, providing knowledge to construct alternative systems of meanings by women and men, and to transgress the dominant interpretation and representation of the world; knowledge that will equip people with the basic competences to understand culture and social world in which they live.

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*Joanna Ostrouch-Kamińska*  
*Faculty of Social Sciences*  
*University of Warmia and Mazury*  
*Poland*

*Cristina C. Vieira*  
*Faculty of Psychology and Sciences of Education*  
*University of Coimbra*  
*Portugal*



## NOTES ON CONTRIBUTORS

**Catherine André**, member of UNESCO Chair “Training of Professionals in Sustainable Development”. Catherine is ‘professeure agrégée’ (lecturer) in the Department of local Management, Tourism and Urbanism (IATU) at the University Bordeaux Montaigne (France). Her research interests concern biodiversity and sustainable development, particularly from a gender perspective, adult learning in formal and informal education, participatory process in sustainable development with a gender focus.

**Elmira Bancheva**, PhD – Head of MSc program “Human Resource Management & Development, School of Management, New Bulgarian University in Sofia (Bulgaria). Her research interests are focused on gender differences in the workplace, transformative learning and transformational leadership, coaching and creativity. She is a member of ESREA Network on Gender and Adult learning.

**Aleksandar Bulajić**, MA, is a PhD student and a teaching assistant of General Andragogy and Didactics in Adult Education at the Department of Pedagogy and Andragogy, Faculty of Philosophy – University of Belgrade (Serbia). His special research interests are those related to cognitive aspects of learning (working memory and intelligence) in adulthood, as well as to constructivist and transformative approaches/aspects of learning.

**Lucia Carragher**, PhD, is a Senior Research Fellow in the Netwell Centre in Dundalk Institute of Technology (Ireland). Her main research interests lie in the field of ageing and later life, with a special interest in education, how older people learn, gender, identity, informal learning and innovative pedagogy. She led the first national study of informal learning through community-based men’s sheds in Ireland.

**Małgorzata Ciczowska-Giedziun**, PhD – Assistant professor in the Department of Social Pedagogy, Faculty of Social Sciences, University of Warmia and Mazury in Olsztyn (Poland). Her research interests concern family pedagogy as well as social work education. She is an author and co-author of articles and books on the field of pedagogy published in Poland. She has been involved in national projects on evaluation in schools.

**Martina Endepohls-Ulpe**, PhD – Academic Director and senior lecturer at the University of Koblenz-Landau, Institute for Psychology. She teaches psychology to student teachers, students of pedagogy and psychology. Research topics are: girls



in science and technology, technology education, high ability (gifted children) and gender difference in the educational system, especially the situation of boys.

**Georg Geber**, M.A. – recently finished his studies of educational sciences at University of Koblenz, working since 2014 in a therapy center for people with autism spectrum disorders in Vallendar. While studying at the University of Koblenz he was involved in projects and qualitative research in several pedagogic/psychological fields, mainly concerning gender research, organisational development and processes in entities of regional pedagogic systems.

**Barry Golding** is a professor and a researcher in adult and community education in the Faculty of Education and Arts, Federation University Australia. His international research focuses on adult learning in community settings, with a specialisation in men's learning. Barry is President of Adult Learning Australia and a Patron of the Australian Men's Sheds Association.

**Elisabeth Hofmann**, head of UNESCO Chair "Training of Professionals in Sustainable Development". 'Maitre de conferences' (lecturer), in the Department of local Management, Tourism and Urbanism (IATU) at the University Bordeaux Montaigne (France), she is also research fellow at 'Les Afriques dans le Monde' in Bordeaux and consultant/trainer on gender and development. Her research concerns feminist activism in Africa, gender in education and training, including participatory approaches in sustainable development.

**Maria Ivanova**, PhD – lecturer at The School of Management, New Bulgarian University (Bulgaria). Her research interests are in the context of gender issues in the workplace. She is a member of ESREA Network on Gender and Adult learning.

**Maja Maksimović**, MA, is a PhD student and a teaching assistant of General Andragogy and Didactics in Adult Education at the Department of Pedagogy and Andragogy, Faculty of Philosophy – University of Belgrade (Serbia). Her special research interests are those related to power relation in adult education, embodied learning and expressive methods and art in education.

**Albertina L. Oliveira**, PhD – Assistant professor at the Faculty of Psychology and Education Sciences, University of Coimbra (Portugal) and Researcher at CEIS20. Her research interests concern adult and elderly education and development, particularly well-being, active and healthy aging, as well as self-directed learning. She is a member of the Editorial Board of the International Journal of Self-Directed Learning (USA).

**Joanna Ostrouch-Kamińska**, PhD – Associate professor at the Faculty of Social Sciences, University of Warmia and Mazury in Olsztyn (Poland); head of the

Department of Research on Family and Social Inequalities, and vice-president of Polish Pedagogical Association. Her research interests concern gender socialization, informal learning in a family, changes in family relations and marriages. Since 2007 she has been a convenor of ESREA Network on Gender and Adult Learning.

**Katarina Popović**, PhD, is Assistant professor at the Faculty of Philosophy – University of Belgrade (Serbia), visiting professor at several European universities, vice-president of EAEA, member of ESREA, ISCAE, editor in chief of *Andragogical Studies* and member of the editorial board of RELA and LLINE. Her research interests are related to the history and philosophy of adult education, transformative approaches to adult learning, professionalisation of adult education and adult teaching and training methods.

**Claudia Quaiser-Pohl**, PhD – head of the department for Developmental Psychology and Psychological Assessment at the University Koblenz-Landau, Institute of Psychology. Her research topics are spatial cognition, i.e. mental rotation - development and gender differences, enhancement of mathematical and scientific abilities in pre-school children, family development from a cross-cultural perspective, applied family psychology, and the empowerment of women in the STEM field.

**Natália Ramos**, PhD – Associate professor at Open University, Lisbon, Portugal. Researcher at the Centre for the Study of Migrations and Intercultural Relations (CEMRI) and coordinator of the Research Group Health, Culture and Development. Author of written and filmic scientific documents about gender, intergenerational, familial, intercultural and migratory issues and their interfaces with psychosocial, educational, communicational and clinical/sanitarian questions.

**Elisabeth Sander**, PhD – head (retired) of the department for Developmental and Educational Psychology at the University of Koblenz-Landau, Institute of Psychology. She founded the Ada-Lovelace-Project (mentoring project aiming at the encouragement of girl's and women's participation in STEM fields). Research activities: Learning difficulties and learning disabilities, divorce and single parenthood, interactive learning with new media, women in STEM.

**Astrid Seltrecht**, PhD – Junior Professor, Teaching Methods in Health Sciences and Nursing Education, Department of Vocational Education and Training, University of Magdeburg (Germany). She focuses her qualitative research on Health Pedagogy and Adult Education. She has completed research projects in the area of lifelong learning and coping strategies for adults with breast cancer and other life threatening diseases.

**Joana Pisco Véstia da Silva** – Graduation in Sciences of Education. Phd Student in the Faculty of Psychology and Sciences of Education (FPCE), University of Coimbra (UC), Portugal. Professional experience in research in education and adult learning and training. Presently working at the Group of Schools of Estremoz, with children and youth at risk and their families.

**Letitia Trifanescu** – PhD student and Teaching assistant in the Education Department, LSHS Faculty, Paris 13/Nord University (France). Her research interests concern feminine migration, social and cultural aspects of learning, biographical research in education.

**Cristina C. Vieira**, PhD – Graduation in Psychology and PhD in Sciences of Education. Assistant professor and researcher at the Faculty of Psychology and Sciences of Education of the University of Coimbra and vice-president of Portuguese Association of Women’s Studies (APEM). Researcher at CEIS20. Her main interests of research are related to education and gender socialization in non-formal contexts, mainly in the family environment.

**Susana Villas-Boas**, MA – Currently doctoral student in Science Education at the University of Coimbra, PhD Scholarship funded by the Foundation for Science and Technology (FCT). Researcher at the Center for Integrated Study of Migration and Intercultural Relations/CEMRI, the Research Group – Health, Culture and Development at the Open University of Lisbon. Her research interests are intergenerational education, intercultural education and gender education.